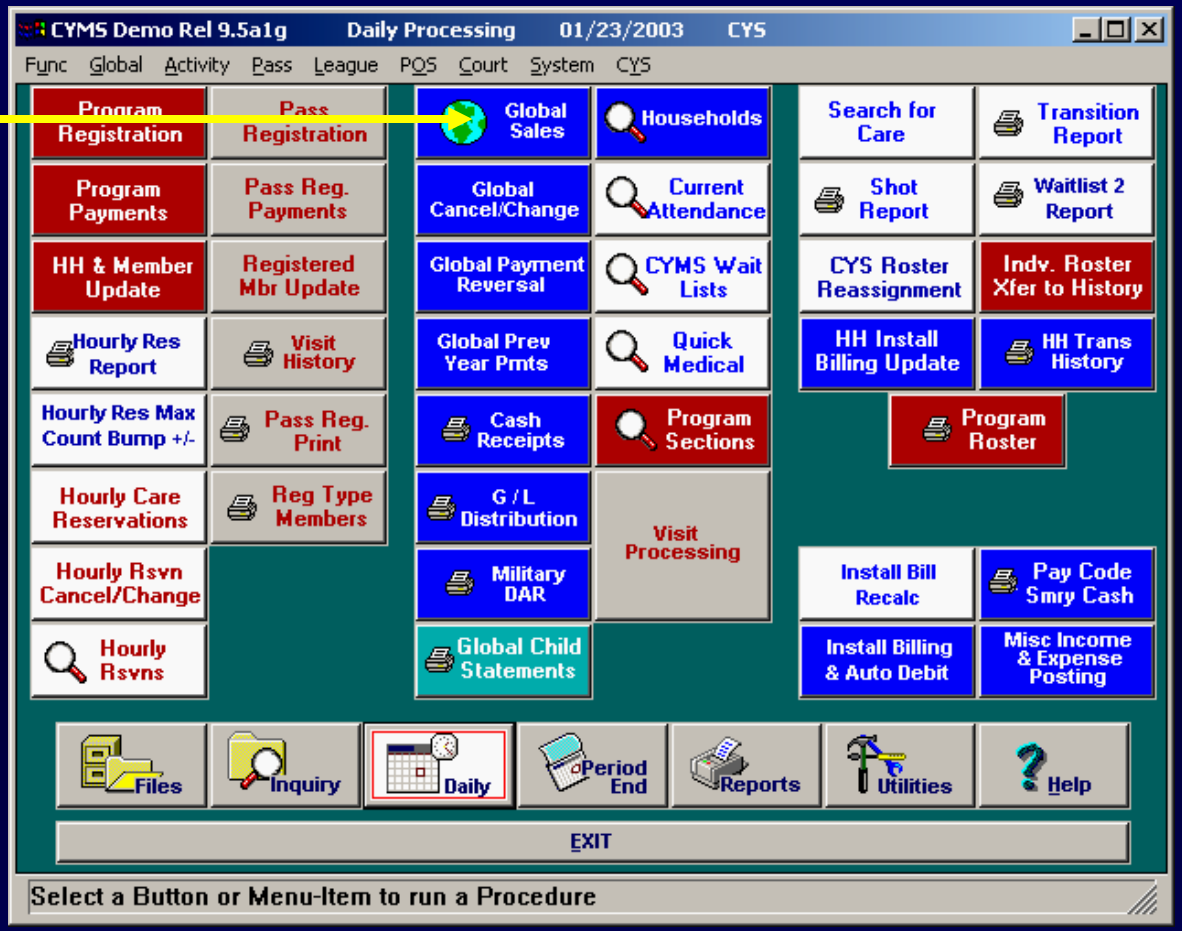
Adding Households to the CYMS Database

The following tutorial will show you how to:

- Add a new household
- Sell a pass
- Place a child in a class

Household Input



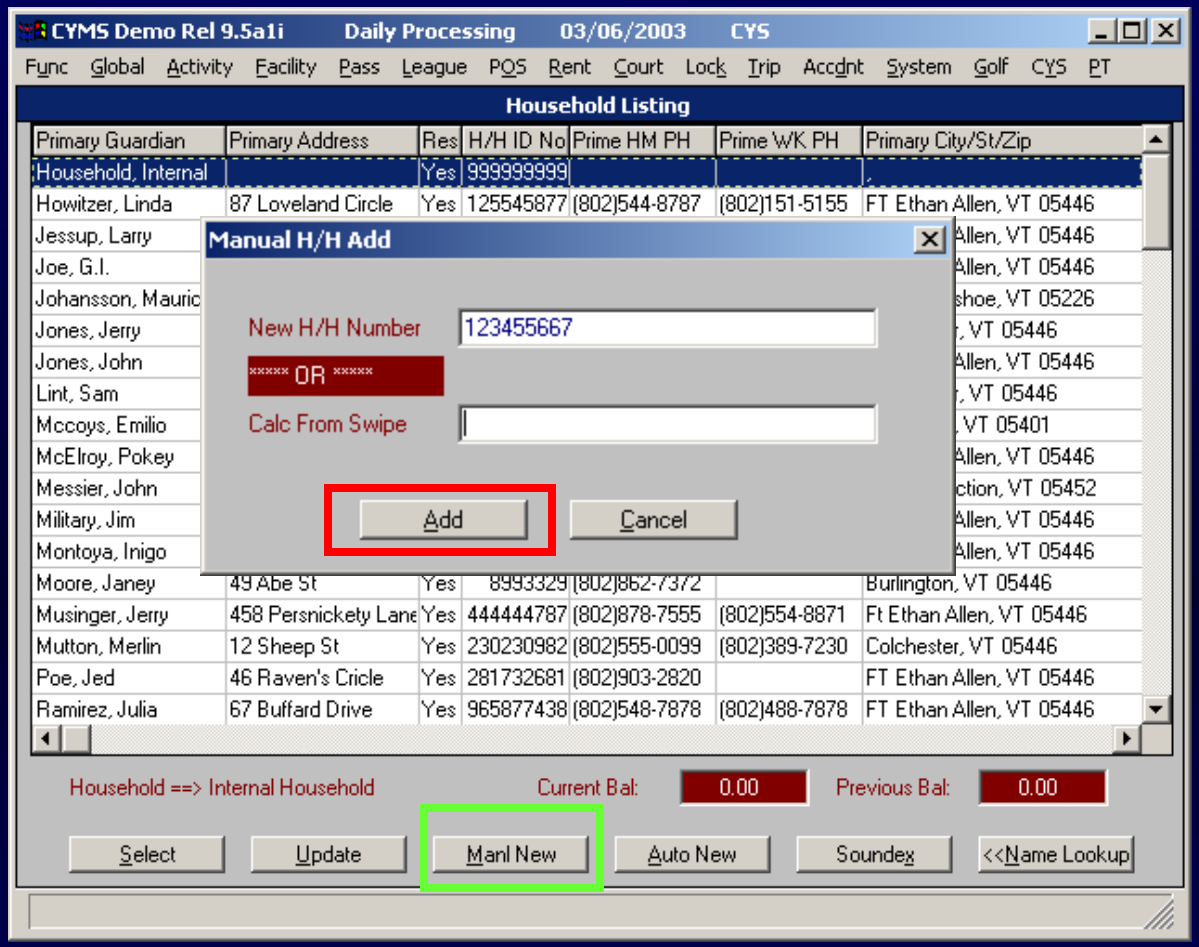
From the CYMS Main Menu Screen

Click Global Sales

Household Input

If the household doesn't exist, click

Manual New


CYMS Demo Rel 9.5a1i
Daily Processing
03/06/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Household Listing
Primary Guardian | Primary Address | Res | H/H ID No | Prime HM PH | Prime WK PH | Primary City/St/Zip
Household, Internal | | Yes | 999999999 | | | ,
Howitzer, Linda | 87 Loveland Circle | Yes | 125545877 | (802)544-8787 | (802)151-5155 | FT Ethan Allen, VT 05446
Jessup, Larry
Joe, G.I.
Johansson, Mauric
Jones, Jerry
Jones, John
Lint, Sam
Mccoys, Emilio
McElroy, Pokey
Messier, John
Military, Jim
Montoya, Inigo
Moore, Janey | 49 Abe St | Yes | 8993329 | (802)862-7372 | | Burlington, VT 05446
Musinger, Jerry | 458 Persnickety Lane | Yes | 444444787 | (802)878-7555 | (802)554-8871 | Ft Ethan Allen, VT 05446
Mutton, Merlin | 12 Sheep St | Yes | 230230982 | (802)555-0099 | (802)389-7230 | Colchester, VT 05446
Poe, Jed | 46 Raven's Cricle | Yes | 281732681 | (802)903-2820 | | FT Ethan Allen, VT 05446
Ramirez, Julia | 67 Buffard Drive | Yes | 965877438 | (802)548-7878 | (802)488-7878 | FT Ethan Allen, VT 05446
Manual H/H Add
New H/H Number
123455667
***** OR *****
Calc From Swipe
Add
Cancel
Household ==> Internal Household
Current Bal:
0.00
Previous Bal:
0.00
Select
Update
Manl New
Auto New
Soundex
<<Name Lookup

Type in the Sponsor SSN

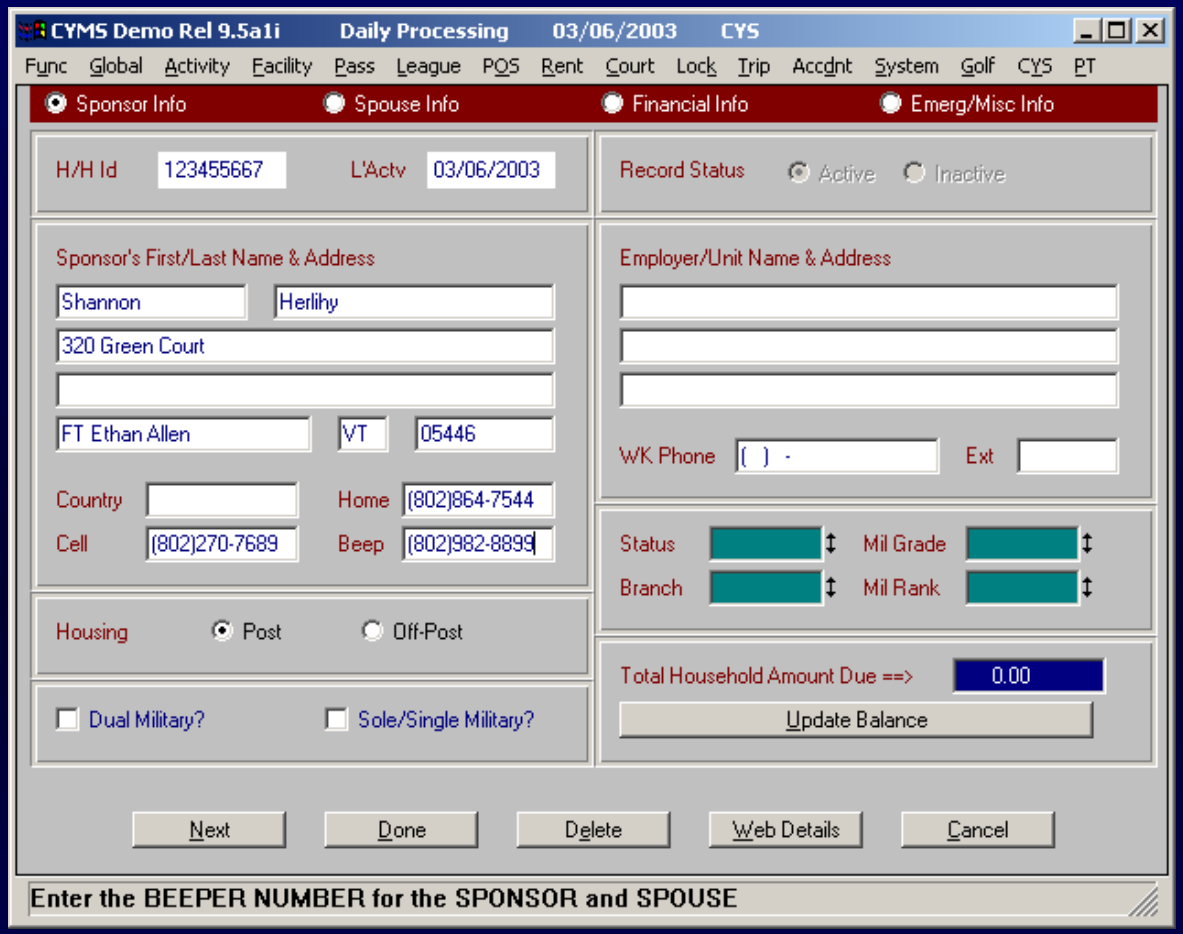
(hyphens not needed)

Click Add

Lookup the household…

Household Input: Sponsor Screen

The first of several fields of data are obvious: name, address, phone #’s, etc.



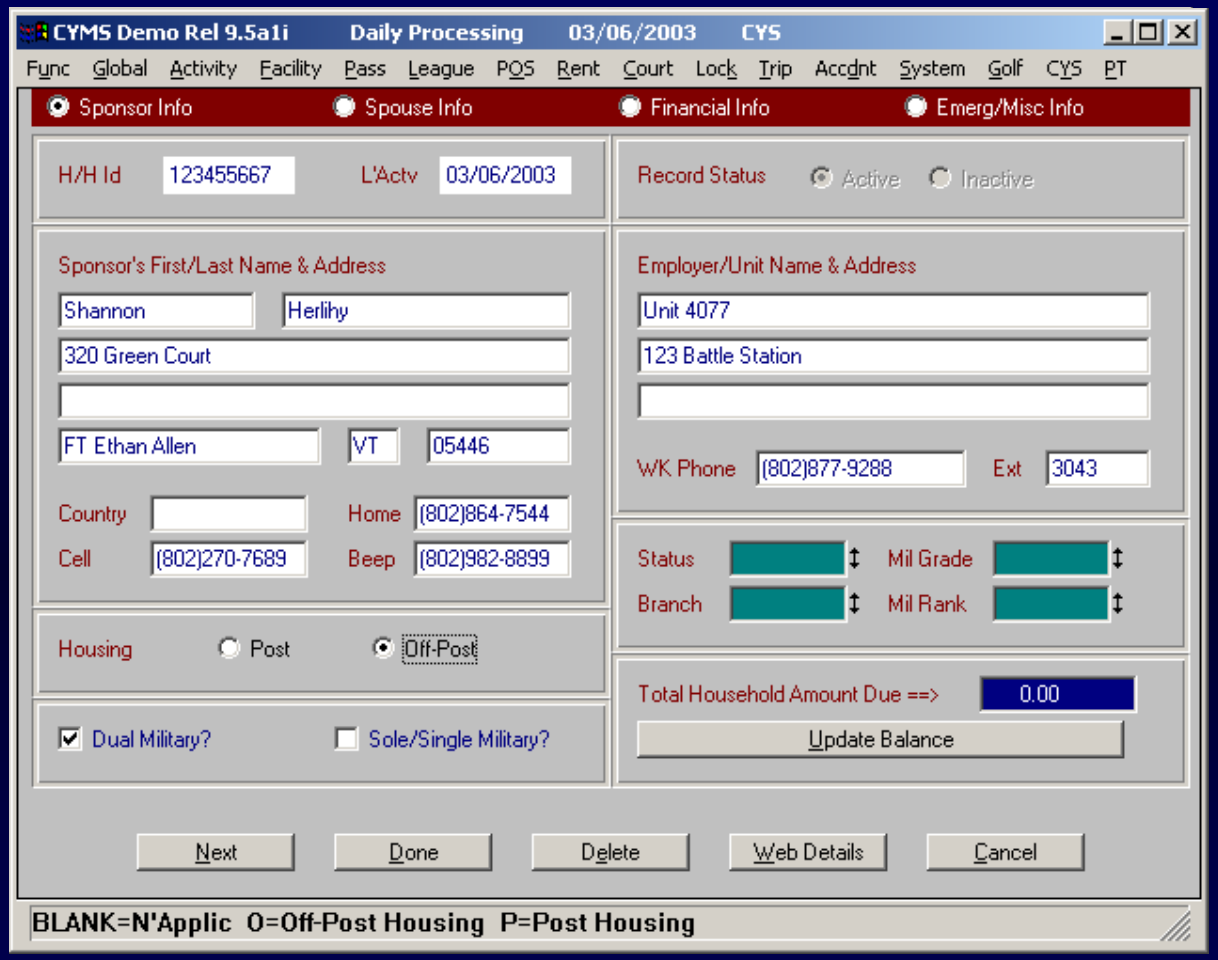
Don’t worry about the country

Note: It’s a good idea to use Upper and Lower Case for all entries. ALL CAPS take up too much space and are hard to read. Mixed databases are a even worse. Keep it clean and standard!

Use your Tab key to go from field to field

Household Input: Sponsor Screen

Toggle whether this HH lives On or Off Post



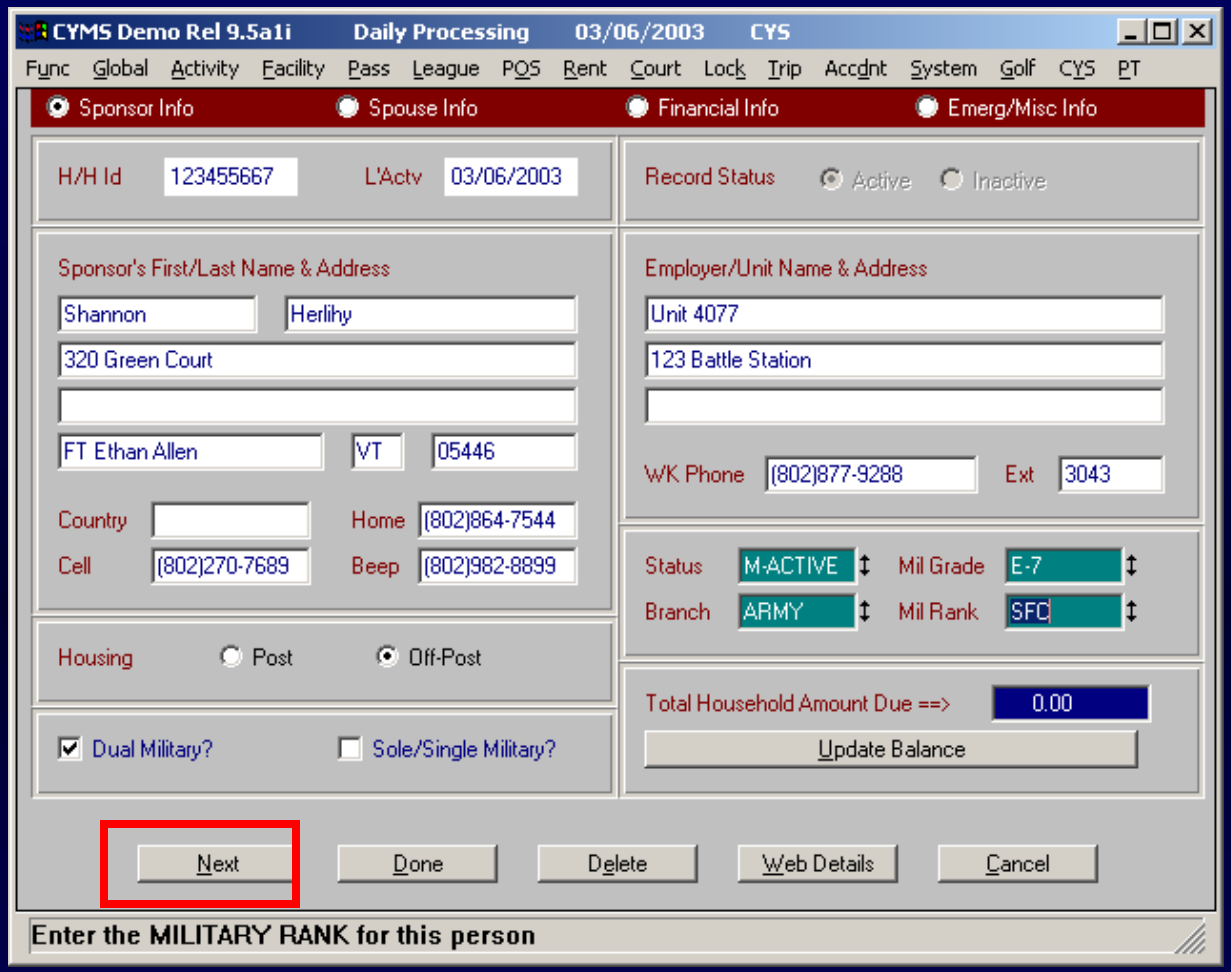
Employer Unit, Name, Address, phone, if applicable

Dual or Sole/Single Military: Isn't what it says – this means -- **Does this family need a Family Care Plan?**

Only click one of these if they do. Otherwise, leave

Household Input: Sponsor Screen

Click Next To continue



If you chose Military Status, Right Click in the Grade or Rank and select one.

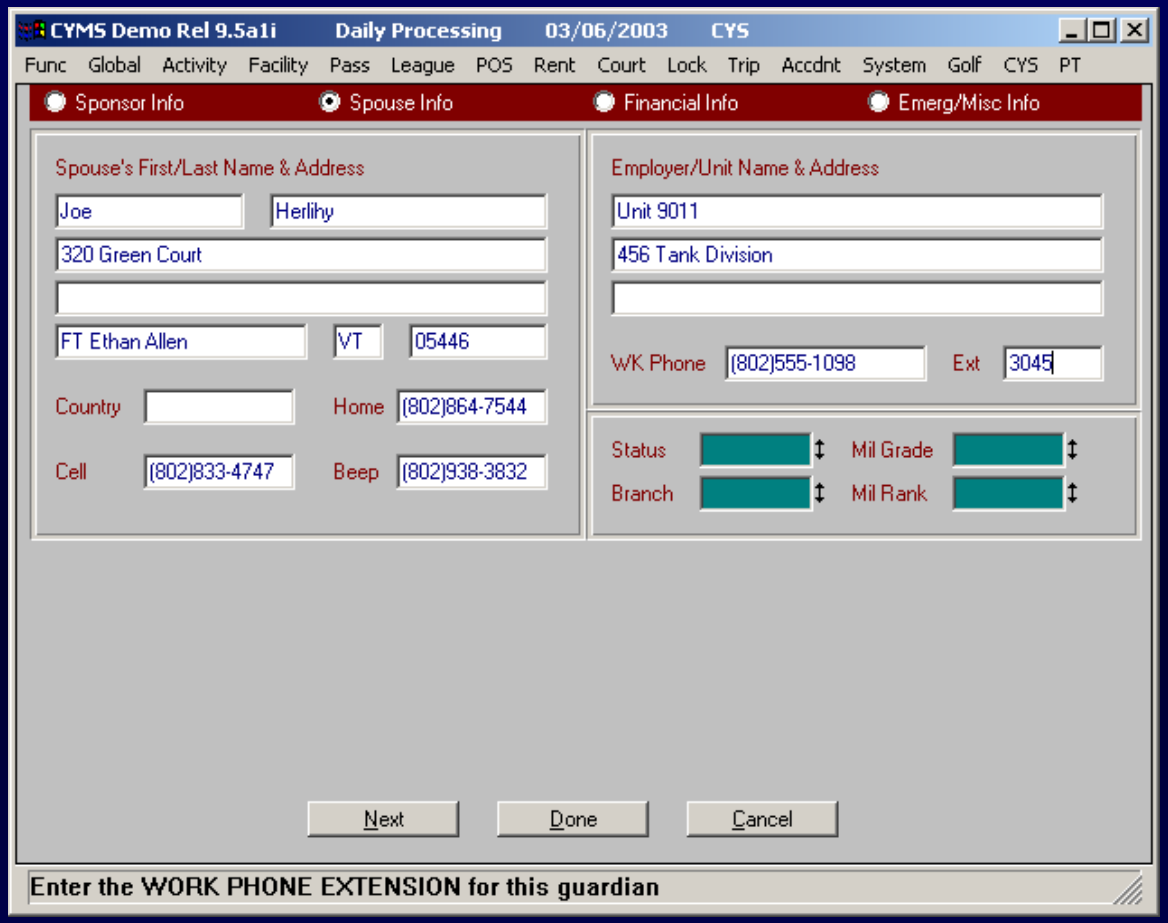
Otherwise leave Branch, Grade and Rank blank

Status: Everyone must have a Status (for annual report !!!!!)

Right Click in the green for a pick-list and select one from list. Don't type one in and don't add to this list !

Household Input: Sponsor Screen

The first several fields of data are obvious: name, address, phone #’s, etc.



Employer Unit, Name, Address, phone, if applicable

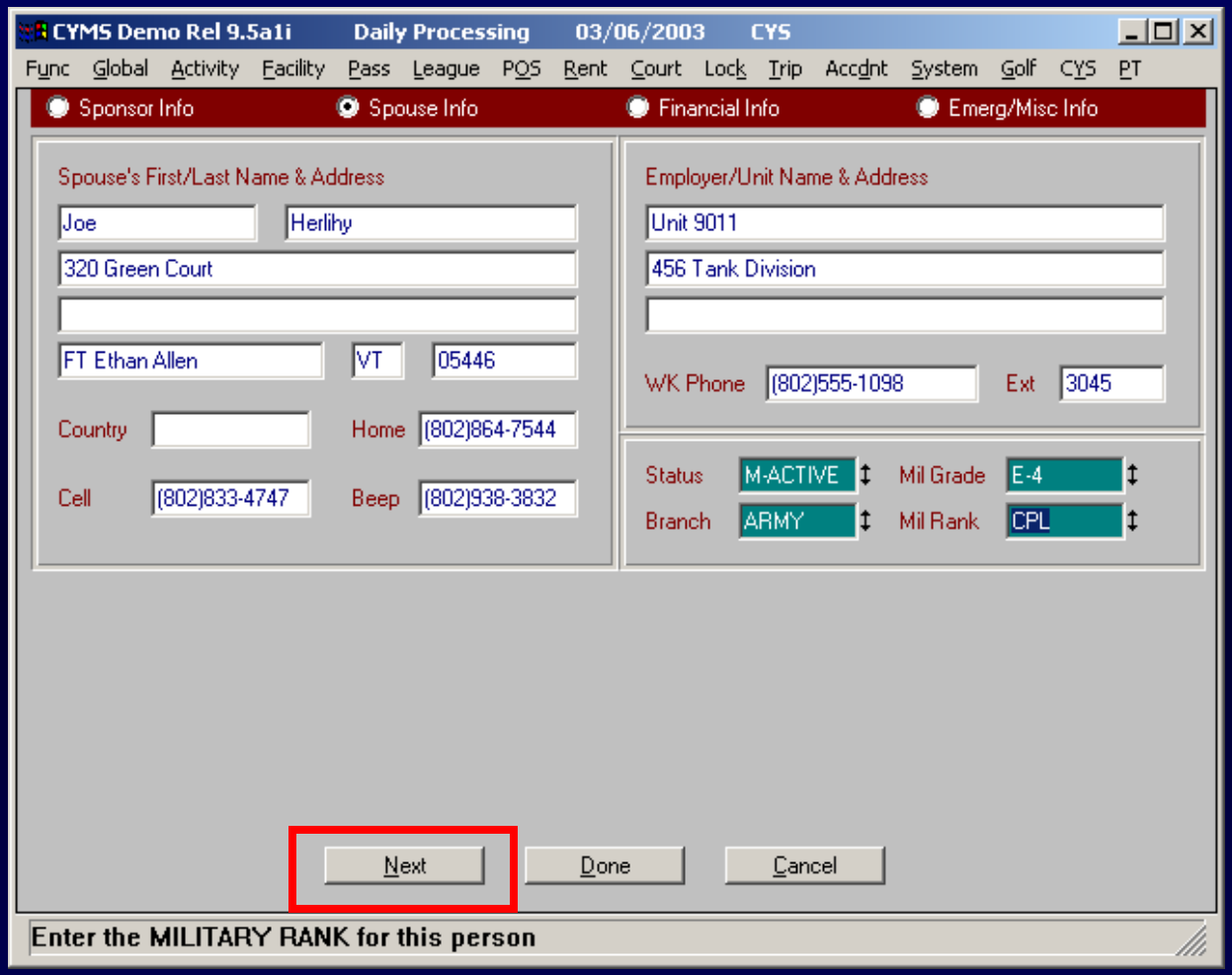
If this Sponsor doesn’t have a Spouse,

Type **No** as the First Name (or leave the field blank) --

leave the Last Name and the rest of the data on the screen as it defaults

Household Input: Sponsor Screen

Click Next to Continue



If you chose <u>Military Status</u>, <u>Right Click</u> in the Grade or Rank and select one.

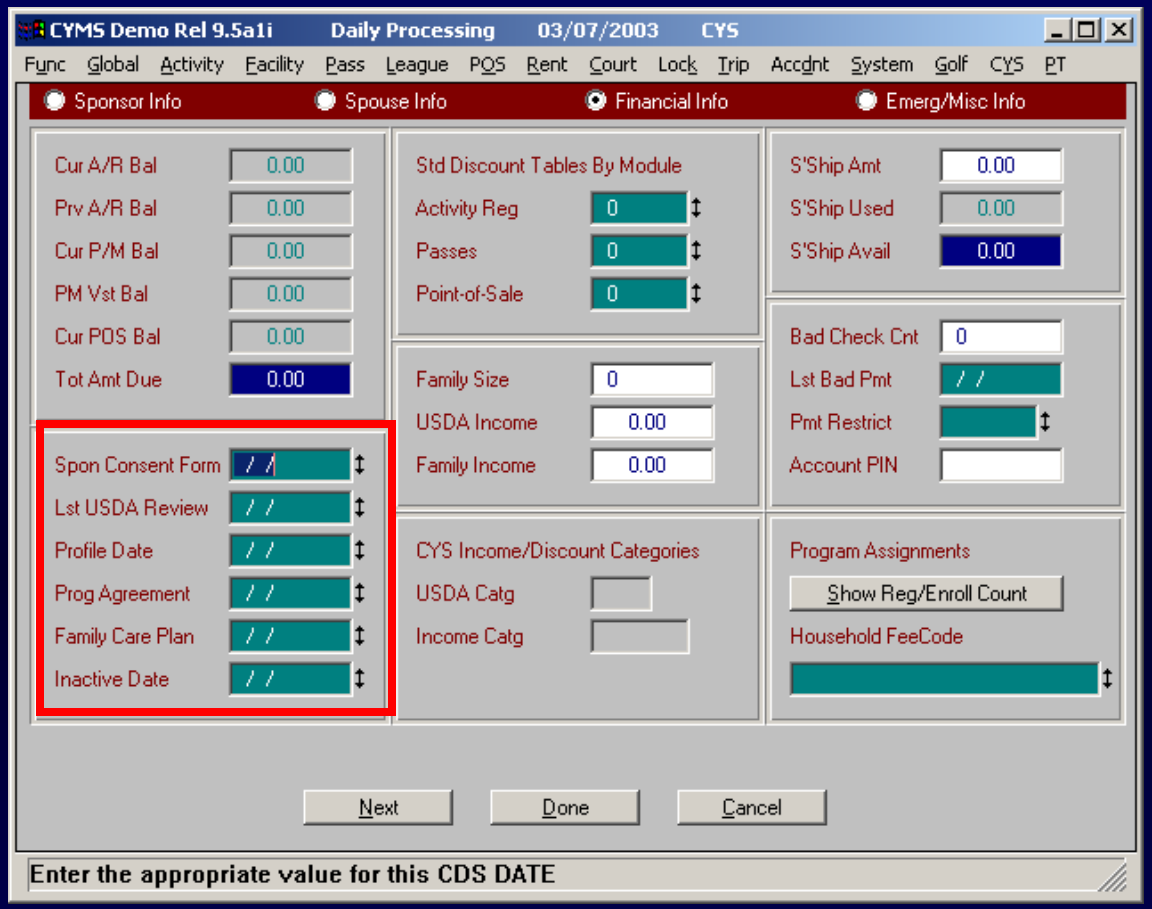
Otherwise leave Branch, Grade and Rank blank

<u>Status</u>: <u>Spouses (as well as sponsors) must all have have a Status</u> for the annual report !

Right Click in the green for a <u>pick-list</u> and <u>select one</u>

Household Input: Financial Screen

Last USDA Review: The last date the USDA form was submitted to the state

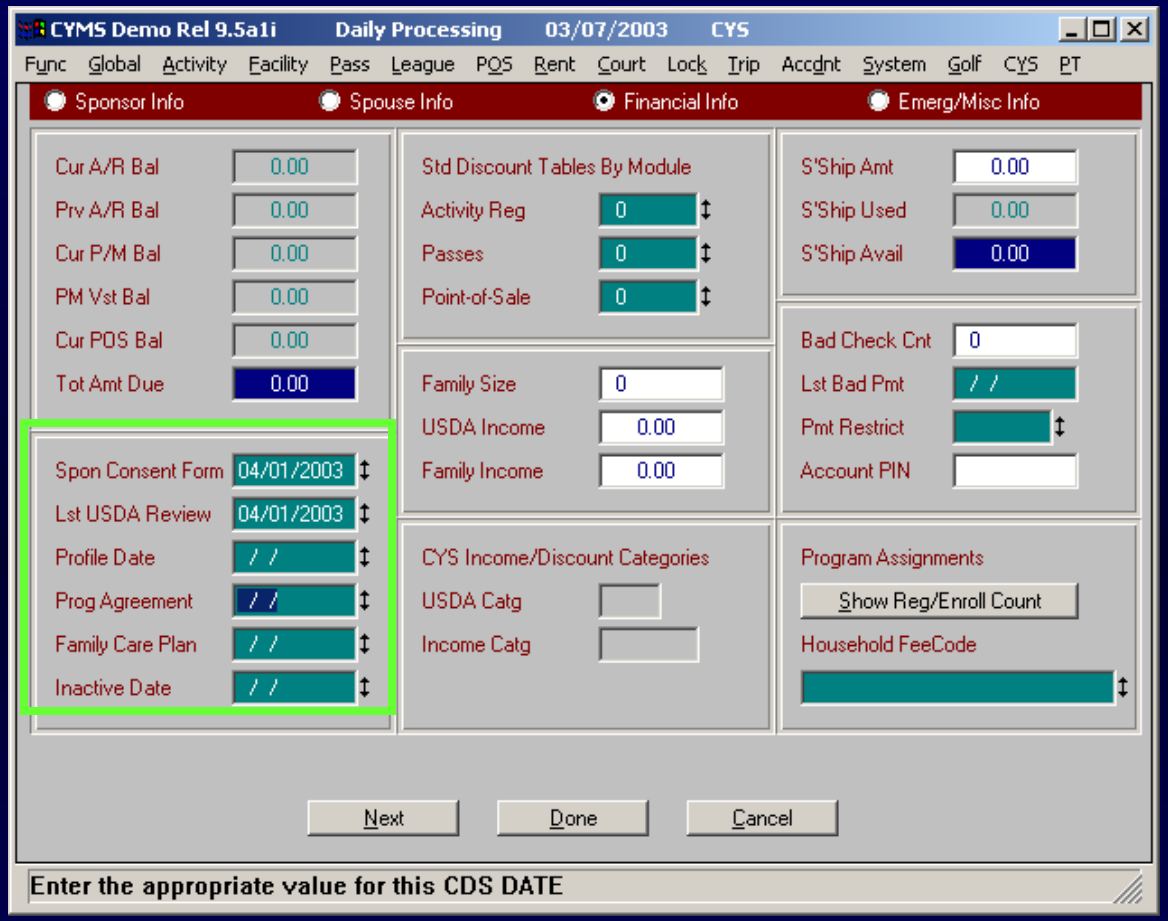


Profile Date: Ignore this field

Sponsor Consent: Usually this is the last time this household Re-registered. Generally this relates to a form the parents sign saying you can take pictures of my child, take them to the hospital in case of emergency, etc.

Household Input: Financial Screen

Family Care Plan: The date you receive the FCP for this household



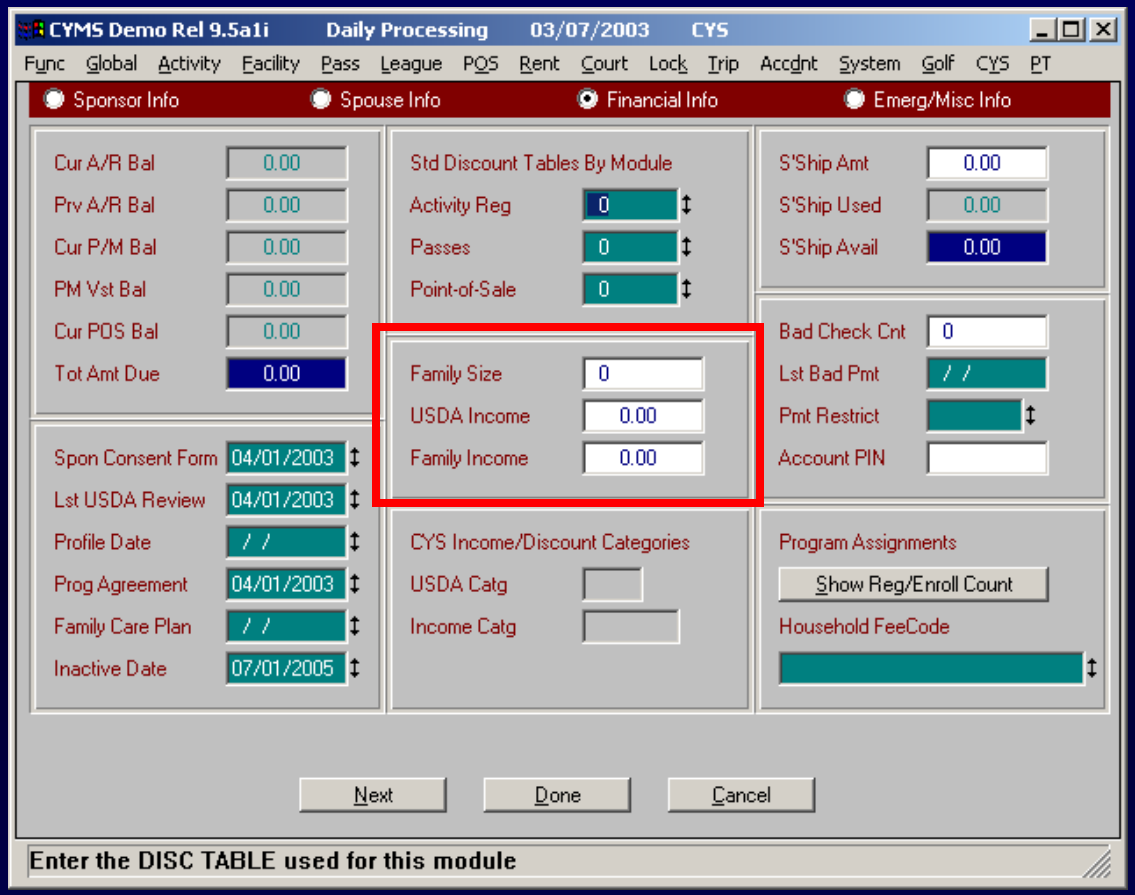
Inactive Date: Some bases are using this as the DEROS Date

Program Agreement: This is the date the clock starts ticking if this household needs a Family Care Plan.

Example: If the household owes you a FCP 30 days from today, Today's Date goes in this field.

Household Input: Financial Screen

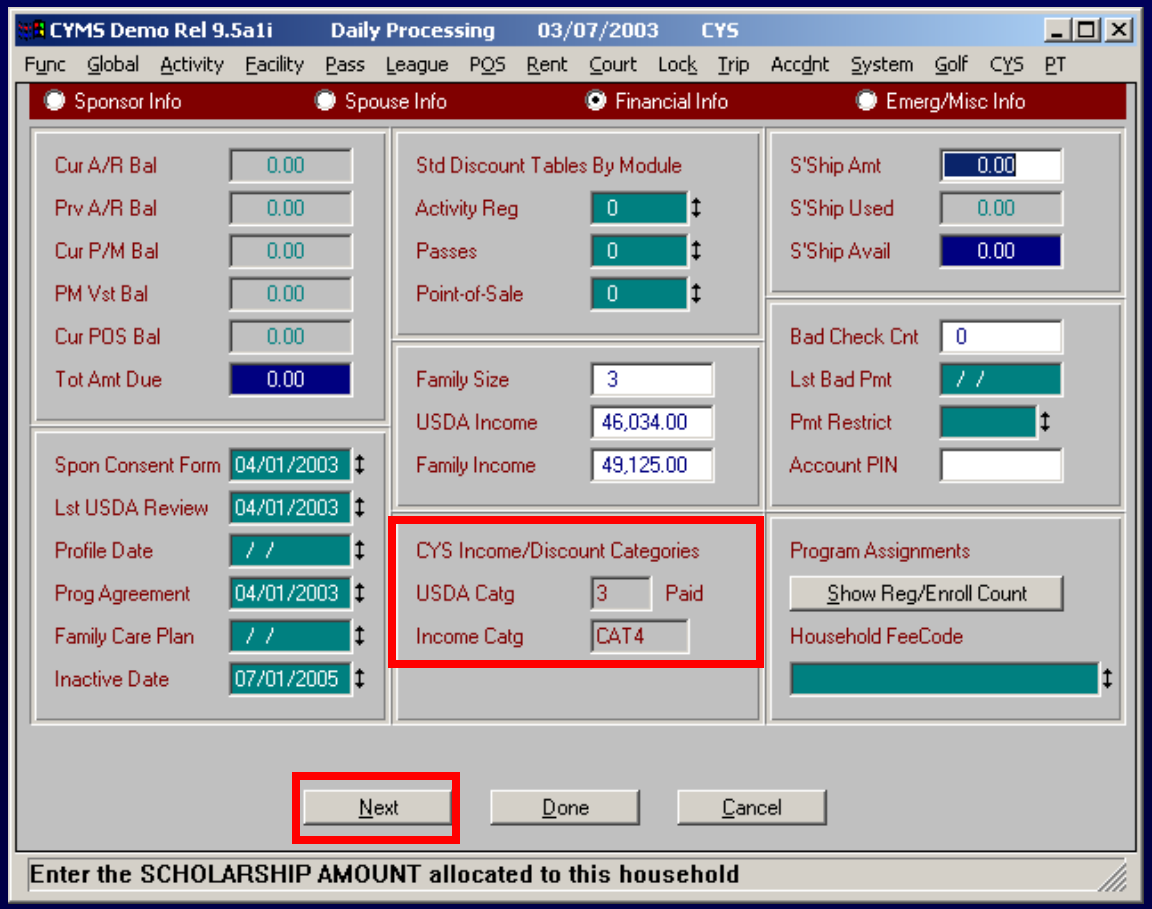
Family Income: Controls the DOD Income Category the household is placed in and how much they are charged for their program fees



Family Size/USDA Income: The Family Size and USDA Income create the Household's USDA category: free, reduced or paid. You must complete these fields for accurate USDA information

Household Input: Financial Screen

Click Next to Continue

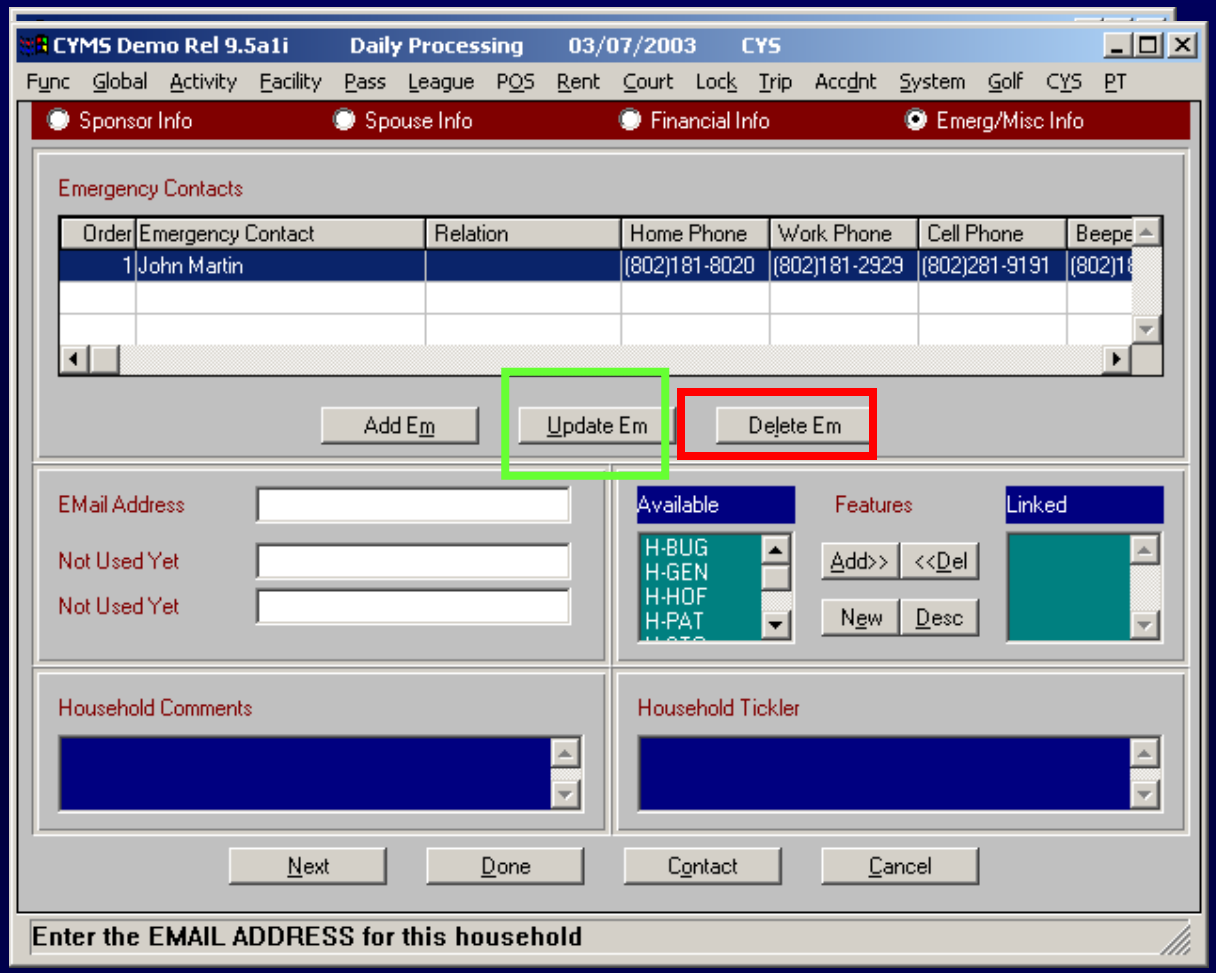


Notice the USDA and Income Category fill in automatically

Household Input: Emergency Screen

Fill in the appropriate data,

then Click Update



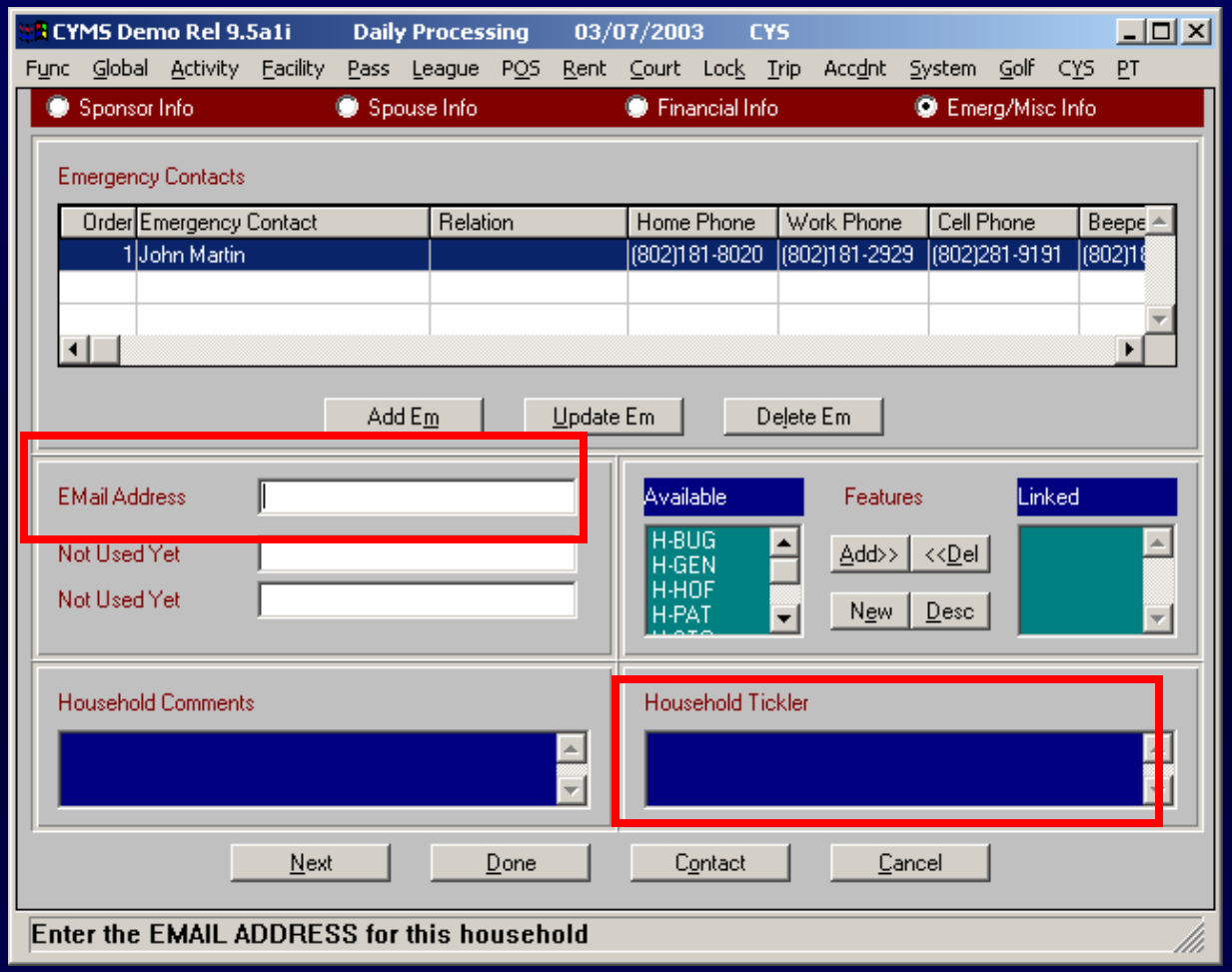
Click Add EM to add more Emergency Contacts

Update EM allows you to Update contacts already attached to the household

Add EM: Click to Add an Emergency Contact

Delete EM allows you to delete an Emergency Contact

Household Input: Emergency Screen



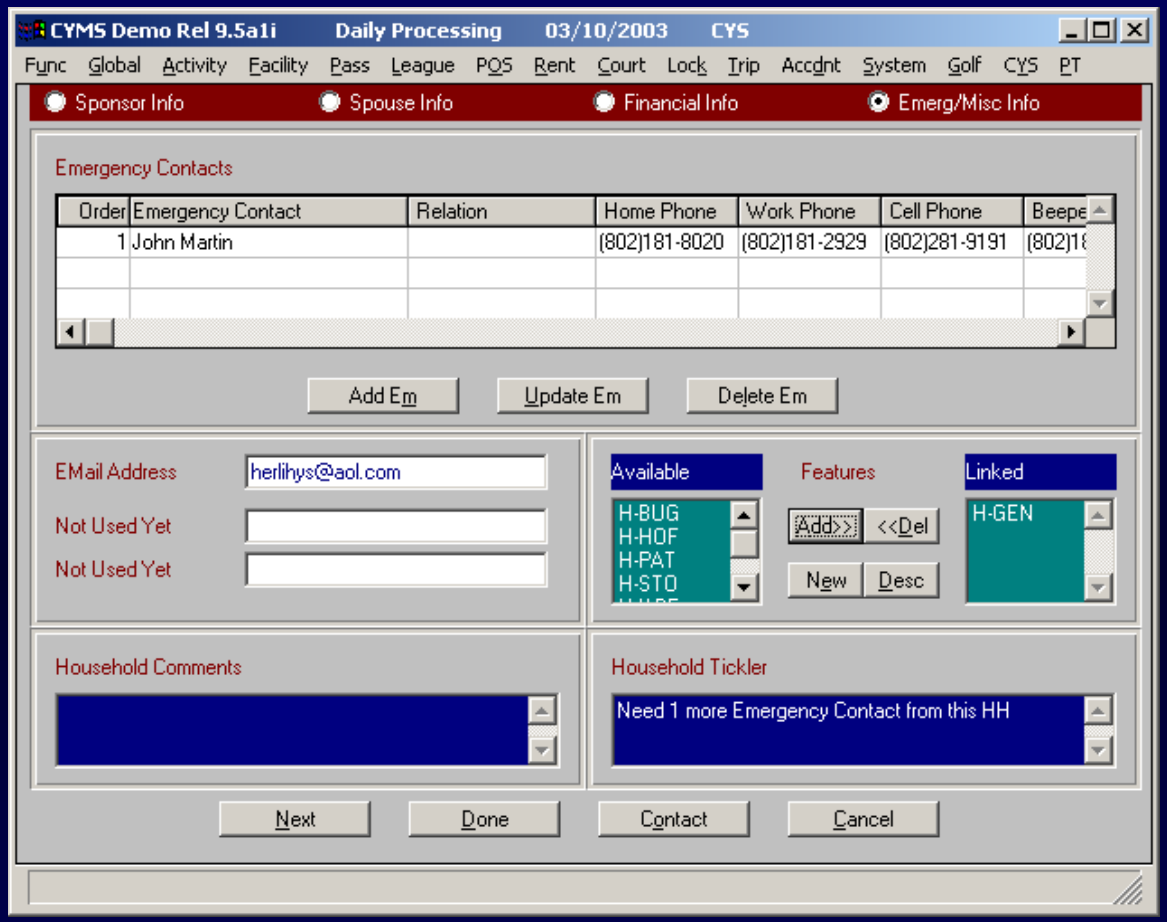
HH Tickler: Anything typed in here will pop up during the swipe in/out process.

If a HH owes you a FCP, type it in here and the clerk can tell the parent

Email Address: This is the email address of the sponsor or spouse !

Household Input: Emergency Screen

HH Comments:These do not pop up during swipes. Just info for your clerks

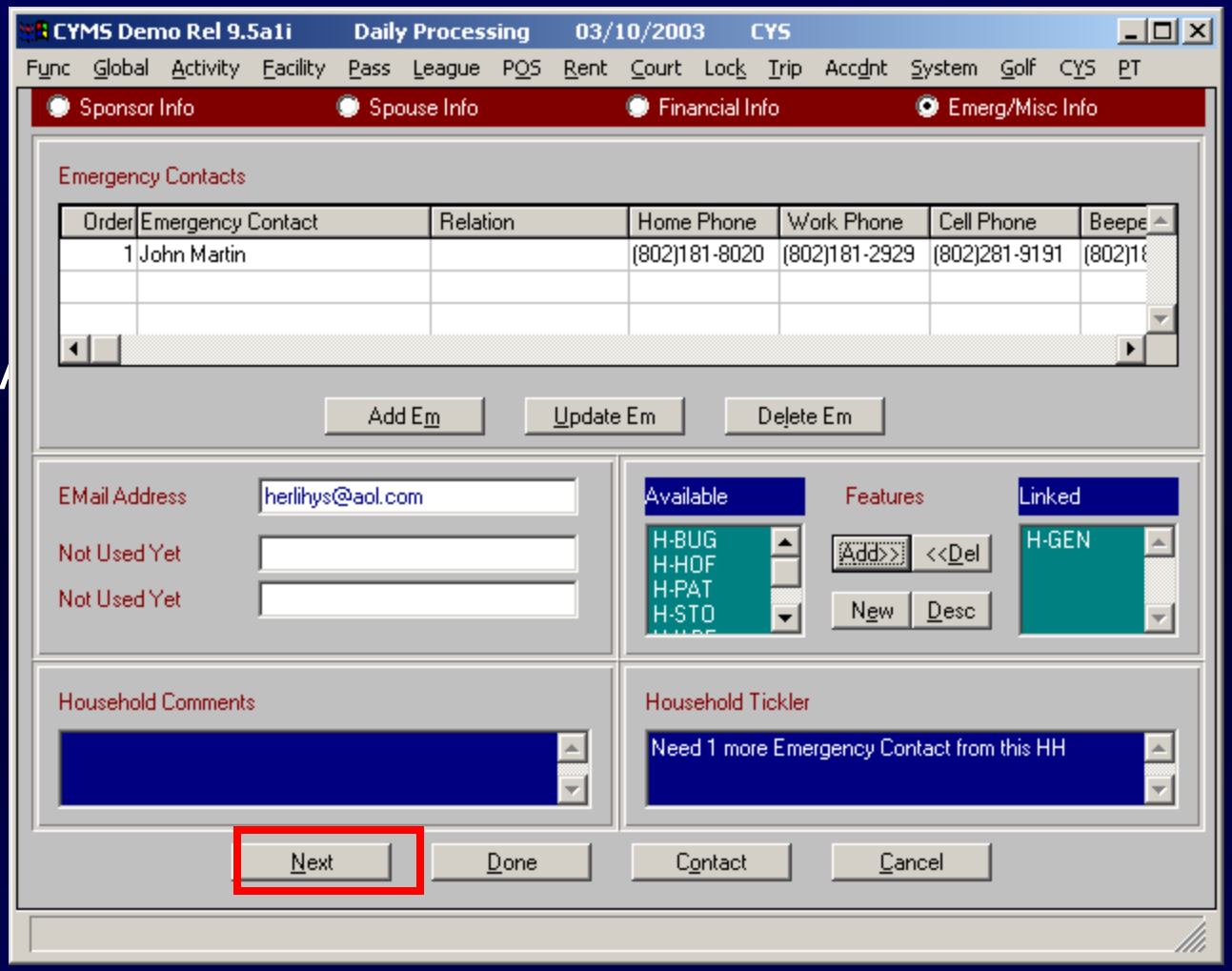


To link a Feature or User Code to a Household, click on the Code and Click Add

The code will then be linked

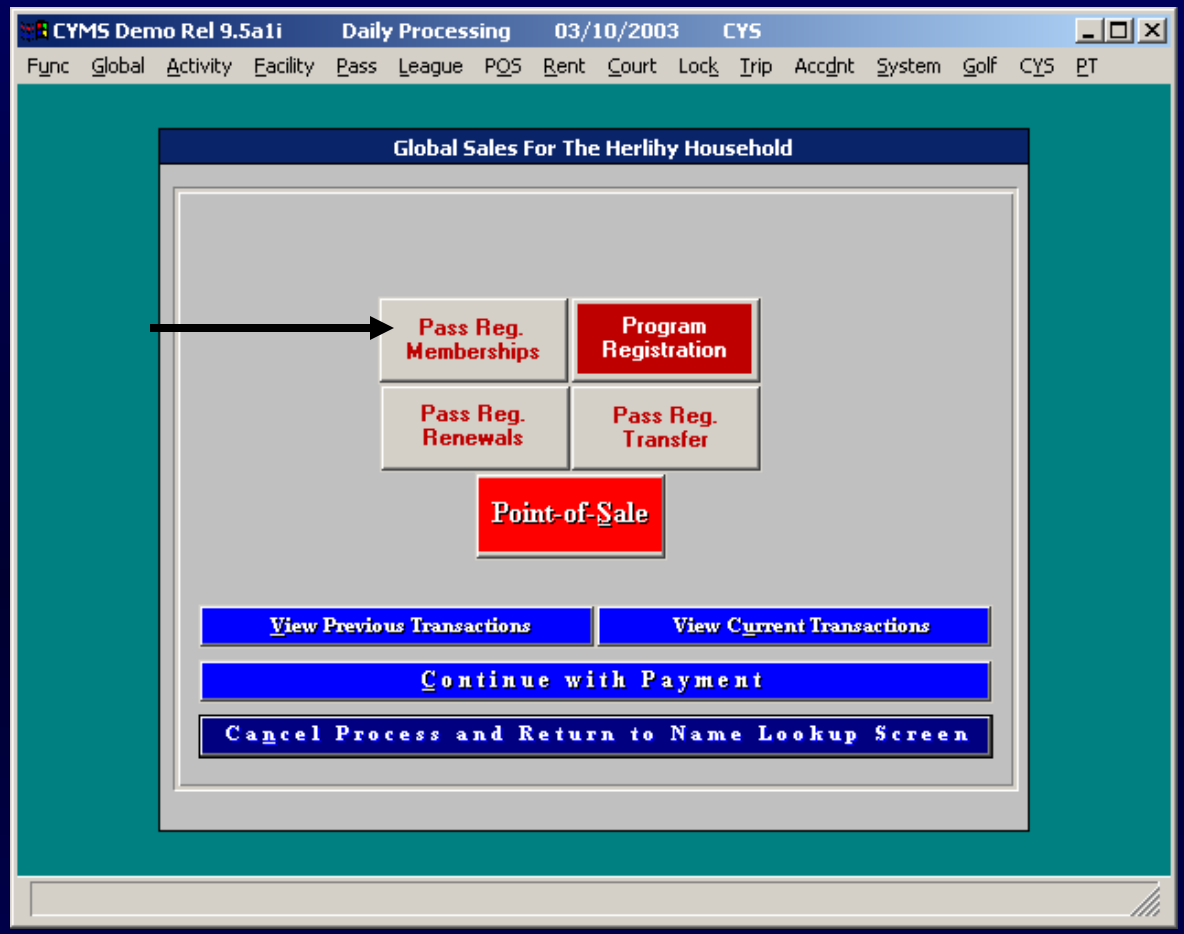
Features or User Codes: These are great marketing tools. Some bases link the housing area to the household. Sponsors can then be targeted for mailings by housing area.

Household Input: Emergency Screen



Click Next to Continue

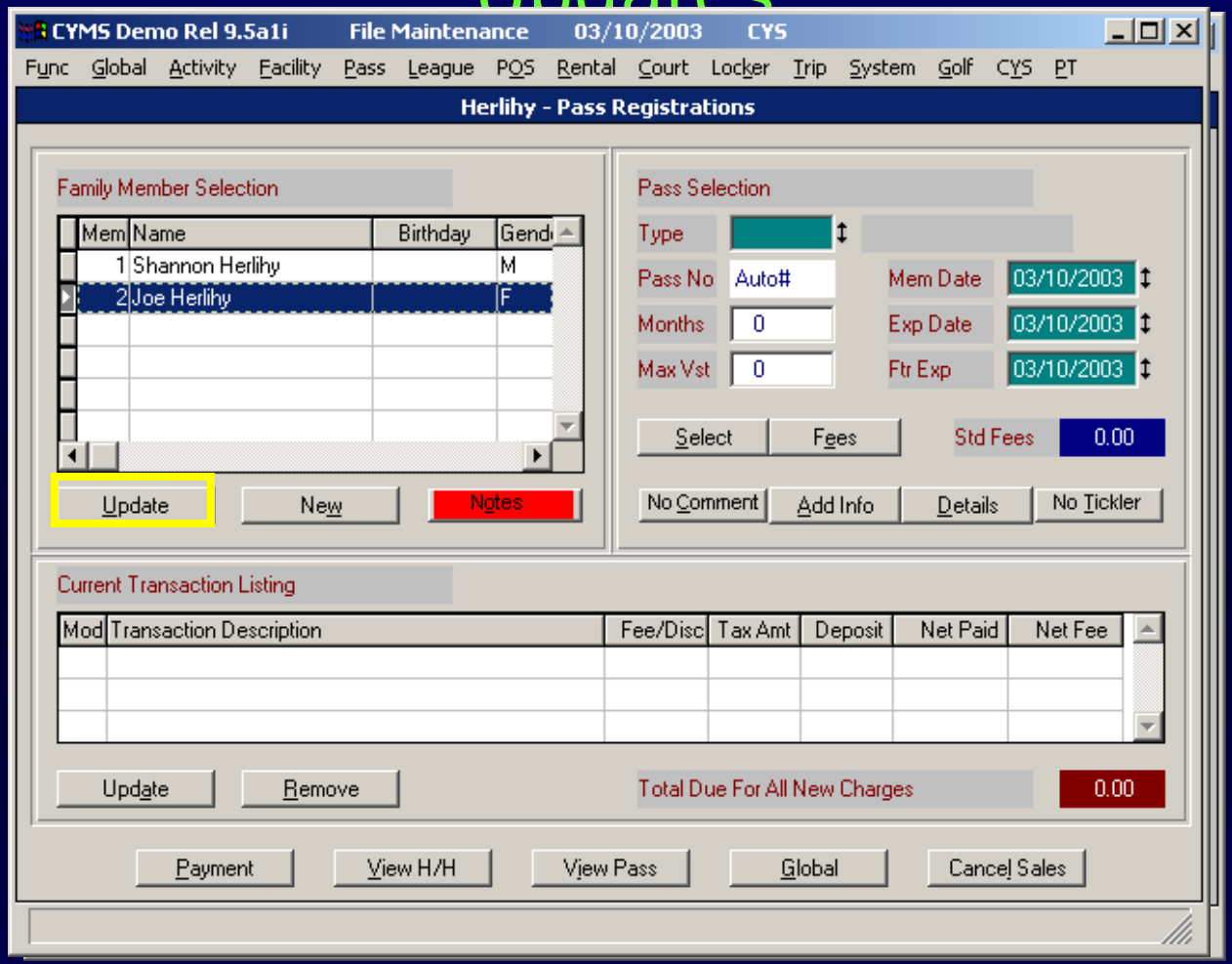
Household Input: Pass Registration



Click Pass Registration Memberships: Remember -- you must have a Pass before you enroll into a class !

Family Member Input: Sponsor/Spouse Updates

Highlight the Sponsor and Click Update



Repeat the process for the Spouse

Update:

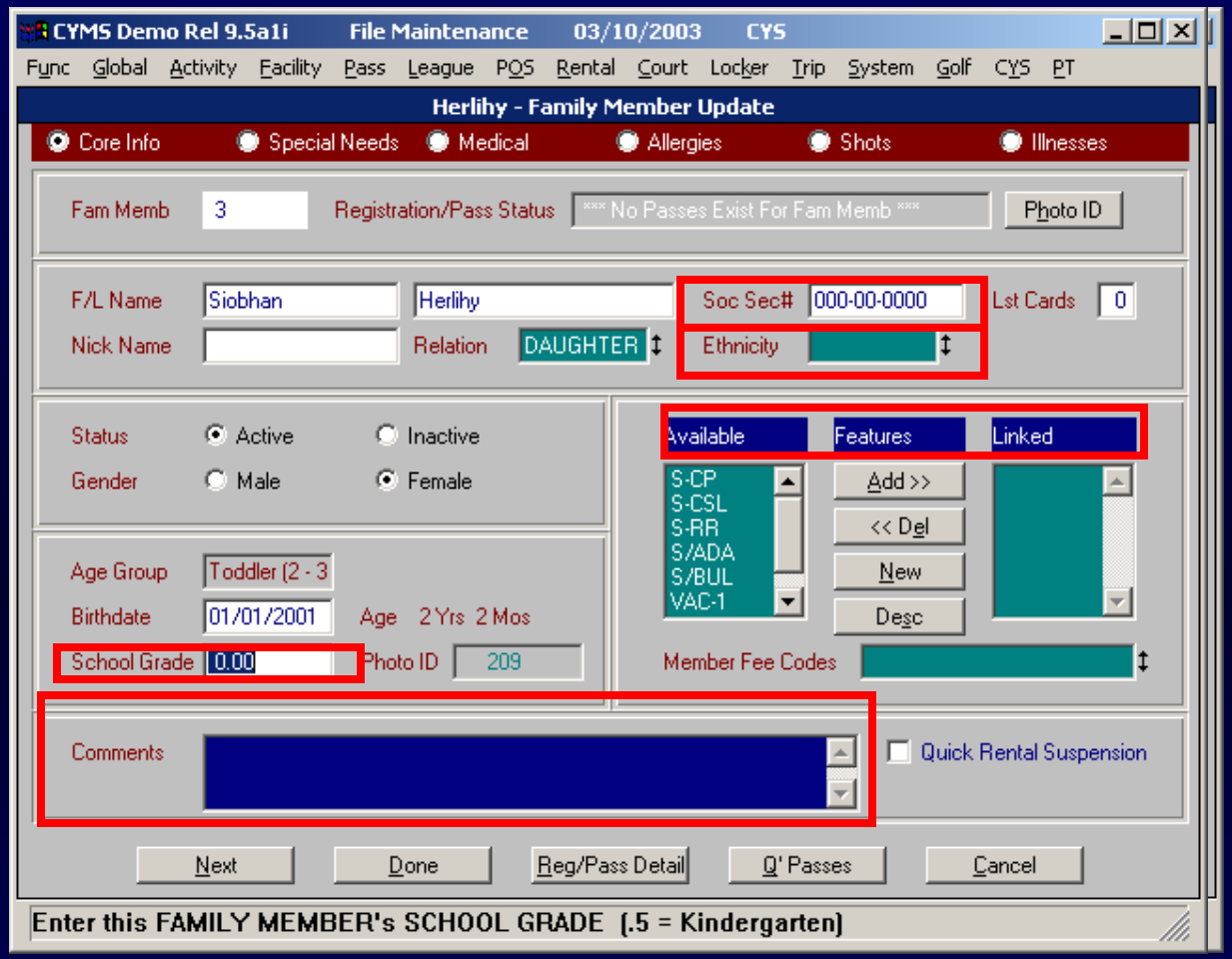
* Relationship (note the point of reference for this is "Relationship to the Sponsor"),
* Ethnicity
* Gender.

Then Click Done

Child Input: Core Info Screen

Required Fields:

First Name, Relationship Gender, Birthdate



Other Data Fields:

Social, Ethnicity, Features (User Codes) School Grade, Comments

To <u>add</u> a child, click New

Child Input: Core Info Screen

SSN: If you have the child's social security number, great. Otherwise, you must leave the field as it defaults with all zeroes

Ethnicity: If you have it, great. Otherwise, leave blank.

Features or User Codes: These are great marketing tools. Some bases link the school district to the child. Children can then be targeted for mailings by school district. Other examples of user codes by family member include linking Vacation Credits or simply the fact that a child is Hourly .

School Grade: Pre-School=.25, Kindergarten=.50, First Grade=1.00, etc.

Comments: These do not pop up during a swipe. Mostly this acts as additional info for your clerk about this particular family member

Child Input: Core Info Screen

More Core Info Notes:

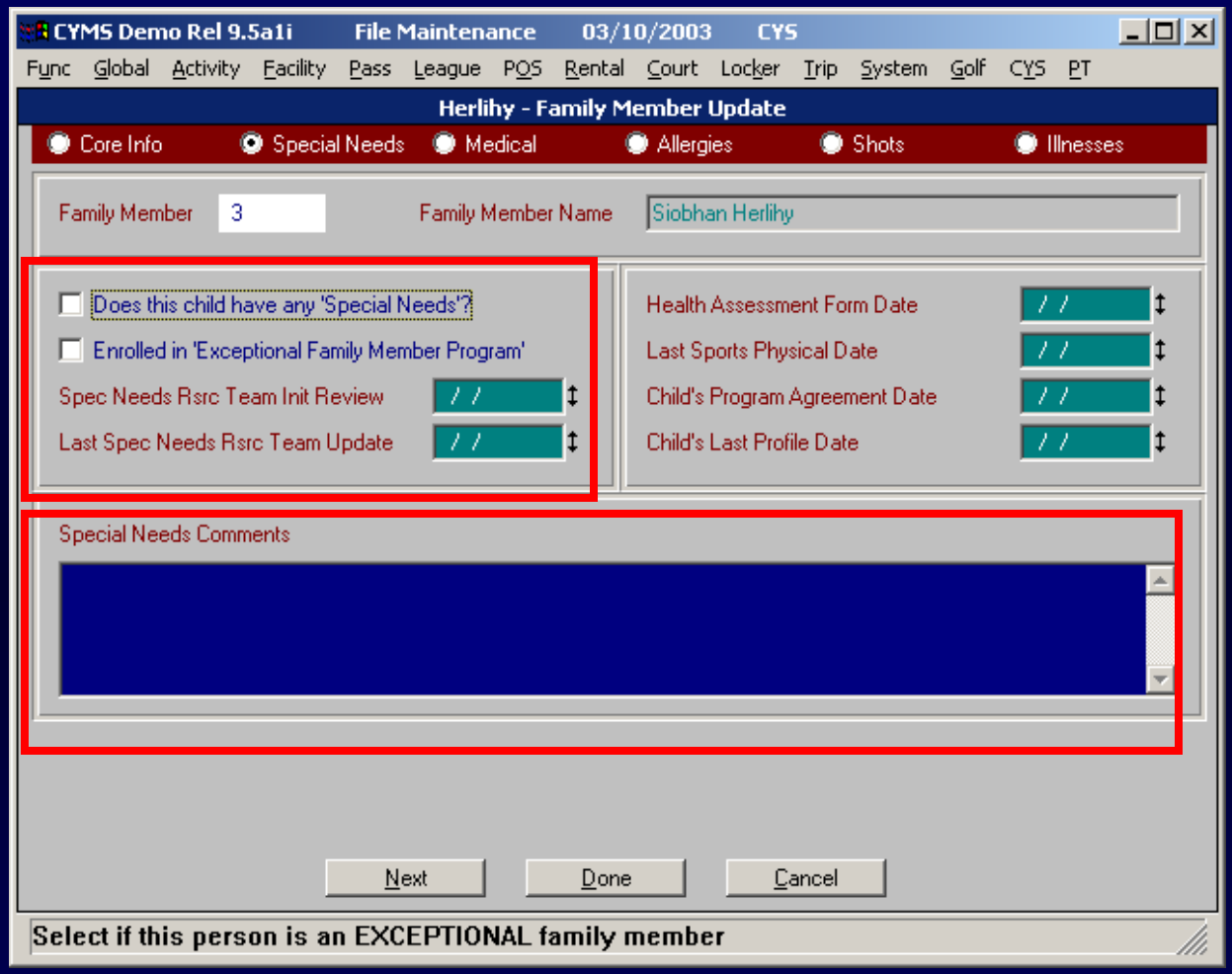
Active/Inactive: Generally speaking you should never toggle the child/sponsor/spouse as Inactive.

* This has nothing to do with their Military Status

* For the most part you control a child's status at the Pass Type level -- they either have an Active or an Expired pass !

Child Input: Special Needs/Health Screen

Click Next



Note: If the child has Special Needs, you will toggle the box and complete EFMP and Date Info if appropriate

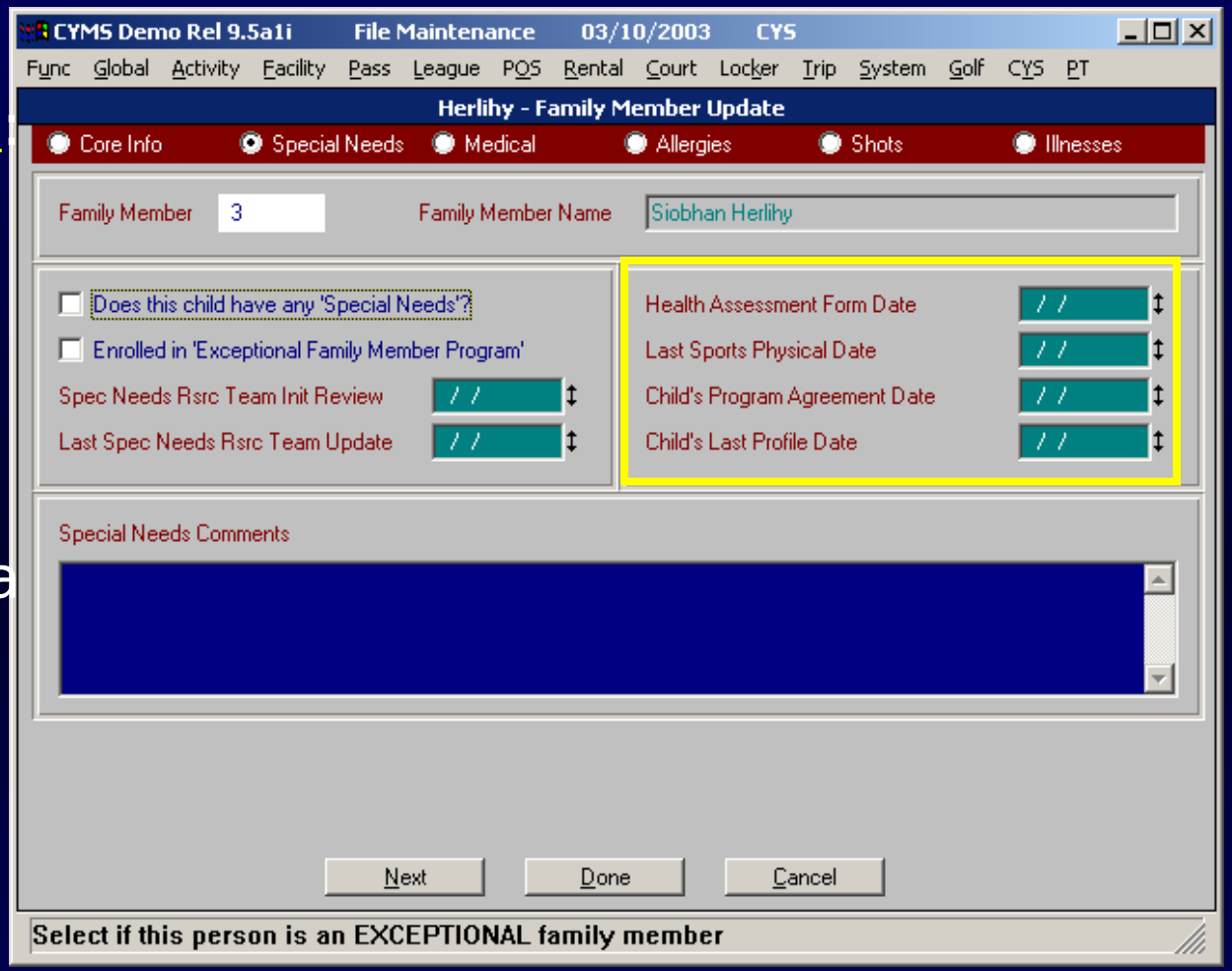
The left side of the screen and the Comments block relates to Special Needs.

Remember, these comments can be viewed by all clerks!

Child Input: Special Needs/Health Screen

Program Agreement: the date the child entered into your program.

Currently a non-reportable field

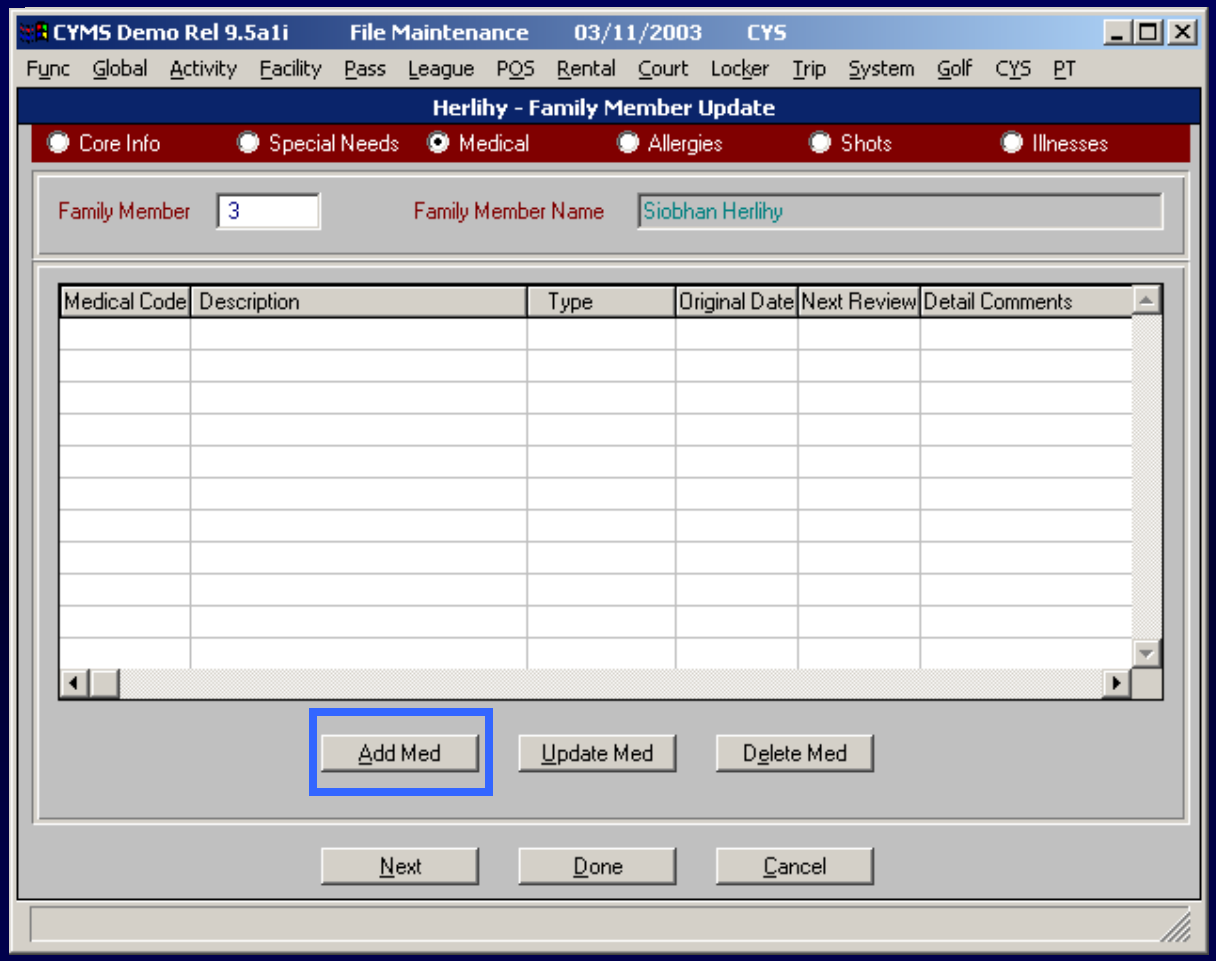


Last Profile Date: The last time the child was profiled to discuss their interests, habits, etc Currently non-reportable

The right side of the screen relates to the child's **Last Health Assessment, Sports Physical, Program Agreement and Profile** date. The first two are easy

Child Input: Medical Screen

Click Next

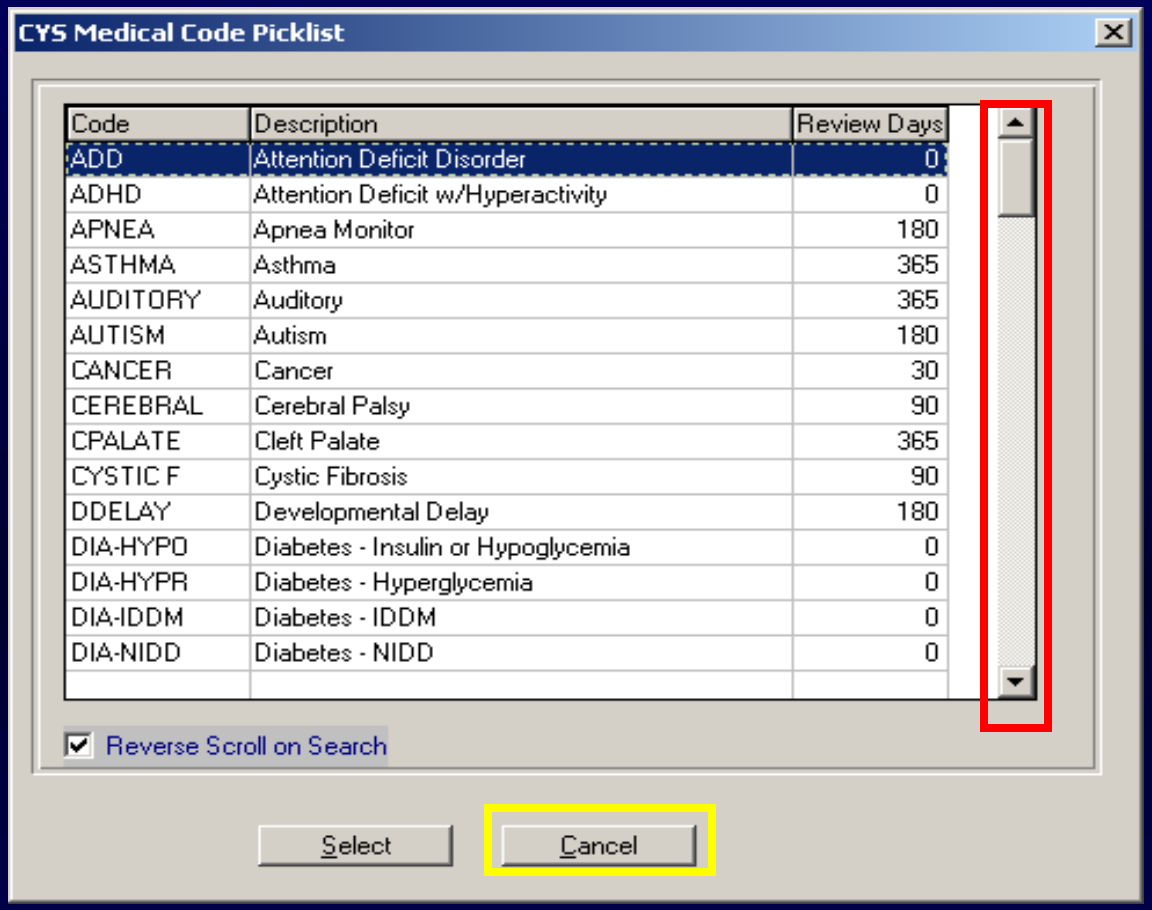


Click Add Med

The Medical Screen is used to track Medical Conditions, Medication the child is taking, and approved Basic Care Items (sunscreen, lotion, etc)

Child Input: Medical Screen

For Example, when Med Condition is toggled and you right click in Med Code, here's the list you get

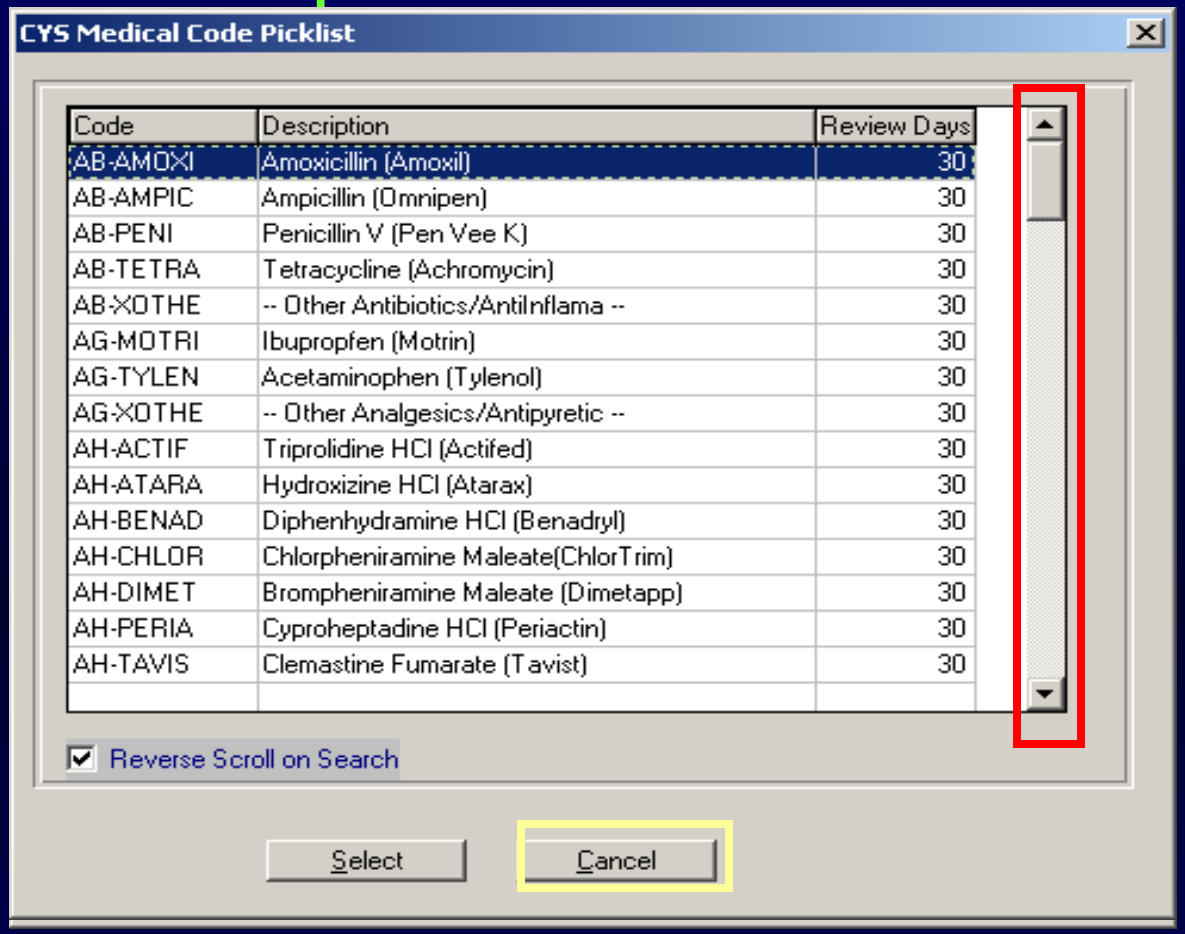


Click Cancel to get back or scroll down and select a Med Condition

Depending on which option is toggled (Med Condition, Medication, Basic Care) your picklist will be different when you right click in the Med Code field.

Child Input: Medical Screen

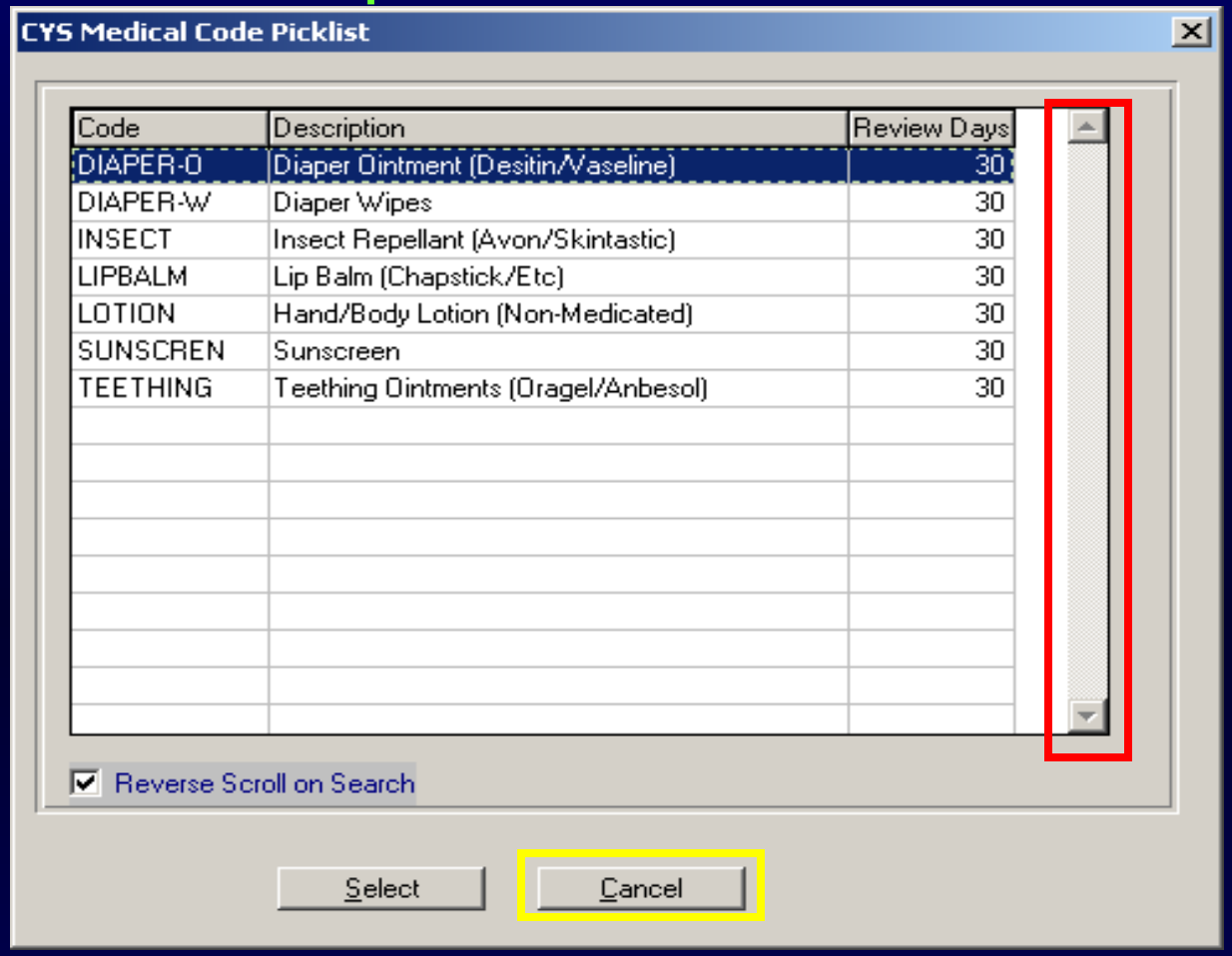
And the List is sorted by codes: AB codes (Anti-biotics), AH codes (Anti-histamines)etc


CYS Medical Code Picklist
Code
Description
Review Days
AB-AMOXI Amoxicillin (Amoxil) 30
AB-AMPIC Ampicillin (Omnipen) 30
AB-PENI Penicillin V (Pen Vee K) 30
AB-TETRA Tetracycline (Achromycin) 30
AB-XOTHE -- Other Antibiotics/AntiInflama -- 30
AG-MOTRI Ibupropfen (Motrin) 30
AG-TYLEN Acetaminophen (Tylenol) 30
AG-XOTHE -- Other Analgesics/Antipyretic -- 30
AH-ACTIF Triprolidine HCl (Actifed) 30
AH-ATARA Hydroxizine HCl (Atarax) 30
AH-BENAD Diphenhydramine HCl (Benadryl) 30
AH-CHLOR Chlorpheniramine Maleate(ChlorTrim) 30
AH-DIMET Brompheniramine Maleate (Dimetapp) 30
AH-PERIA Cyproheptadine HCl (Periactin) 30
AH-TAVIS Clemastine Fumarate (Tavist) 30
Reverse Scroll on Search
Select
Cancel

Click Cancel or Scroll down and select a code

If you toggle Medication and right click in the Med Code field, notice the picklist is different

Child Input: Medical Screen

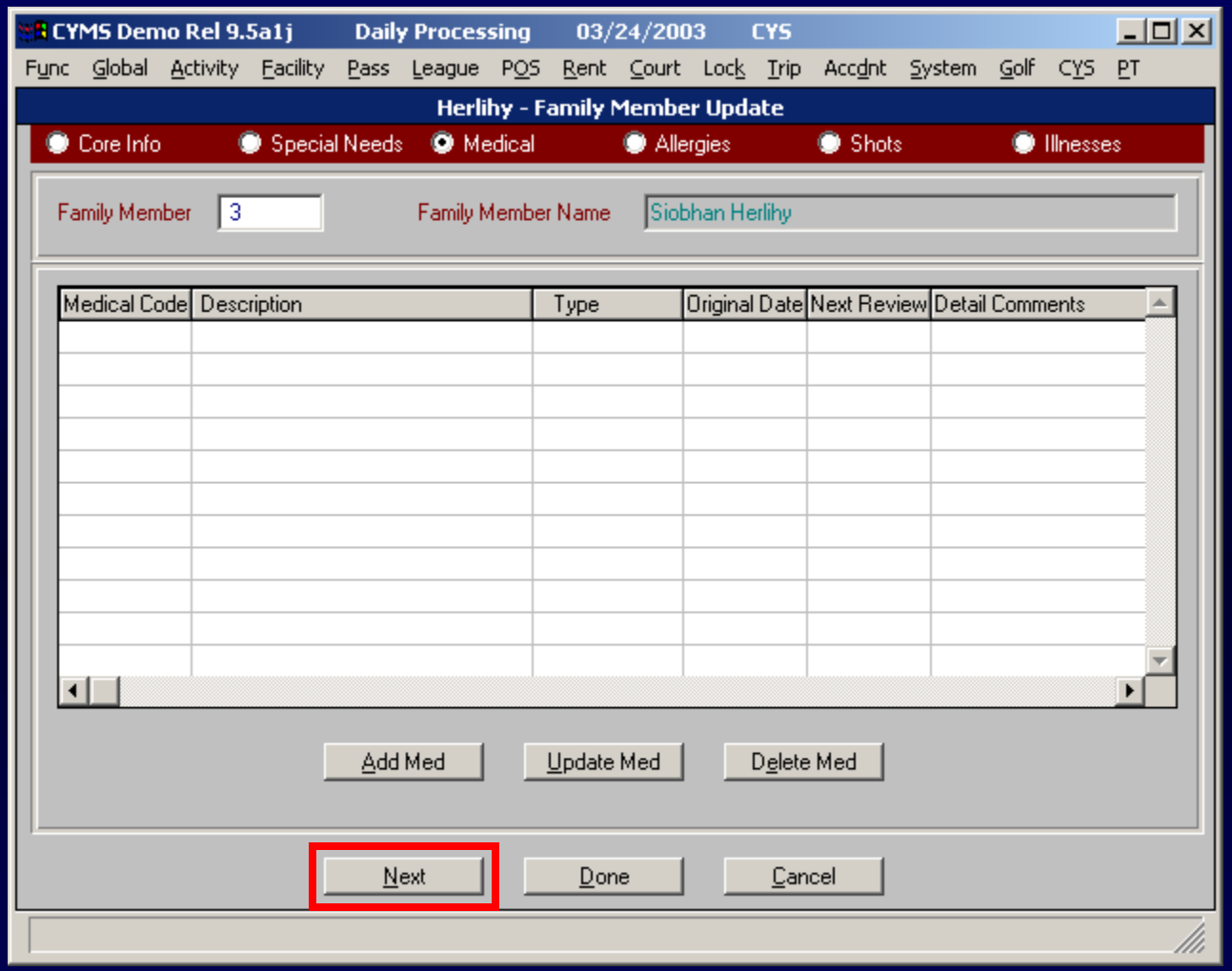


Click Cancel or Scroll down and select a code

If you toggle Basic Care and right click in the Med Code field, notice the picklist is different yet again

Child Input: Medical Screen

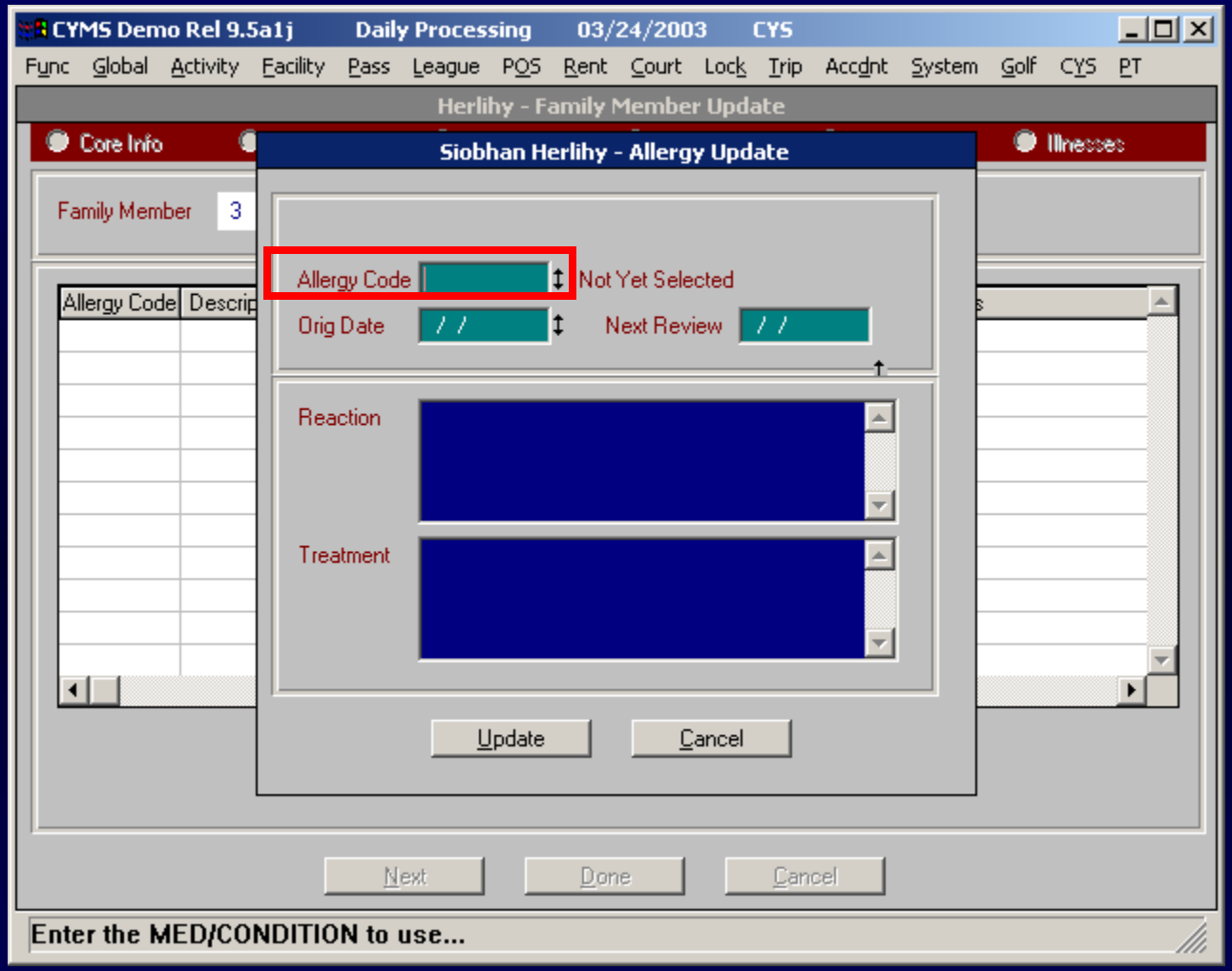
Then Next to Continue



Click Cancel (or make Comments, fill in dates and Update if you selected a code)

Child Input: Allergy Screen

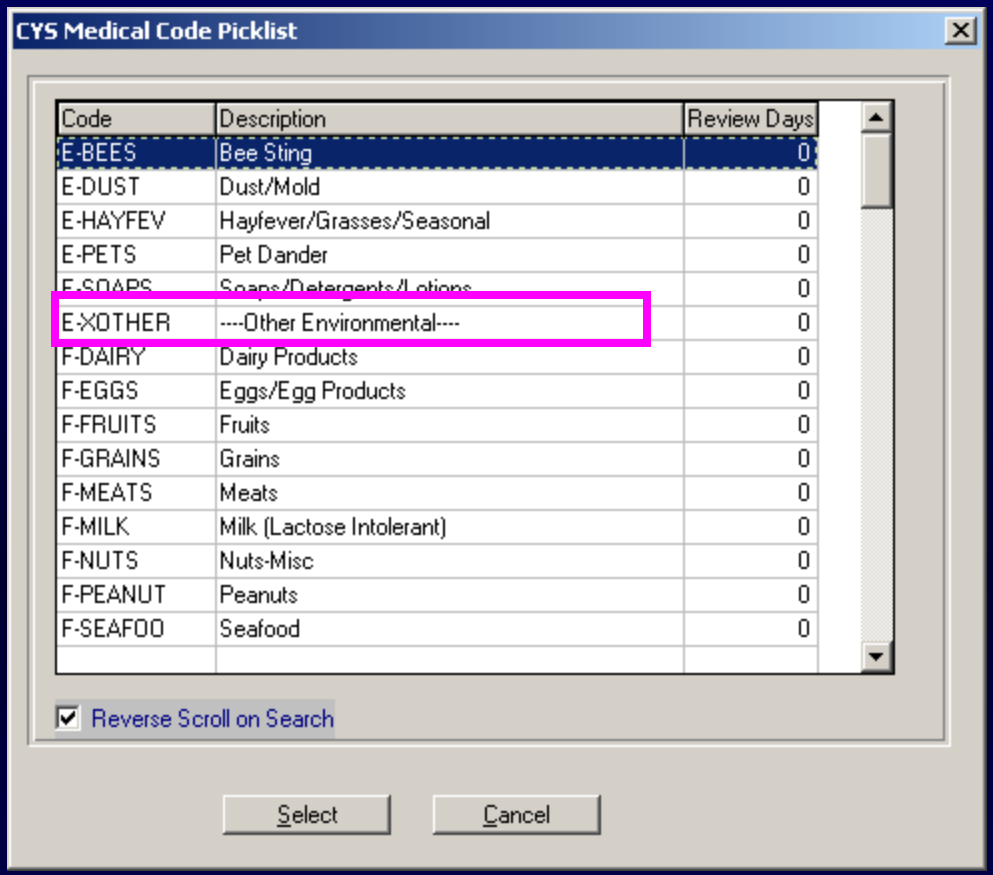
Right Click in the Allergy Code Field



Click Add Allergy if this child has a validated allergy

Child Input: Allergy Screen

If you can't find the right allergy, there is an Other at the end of each section



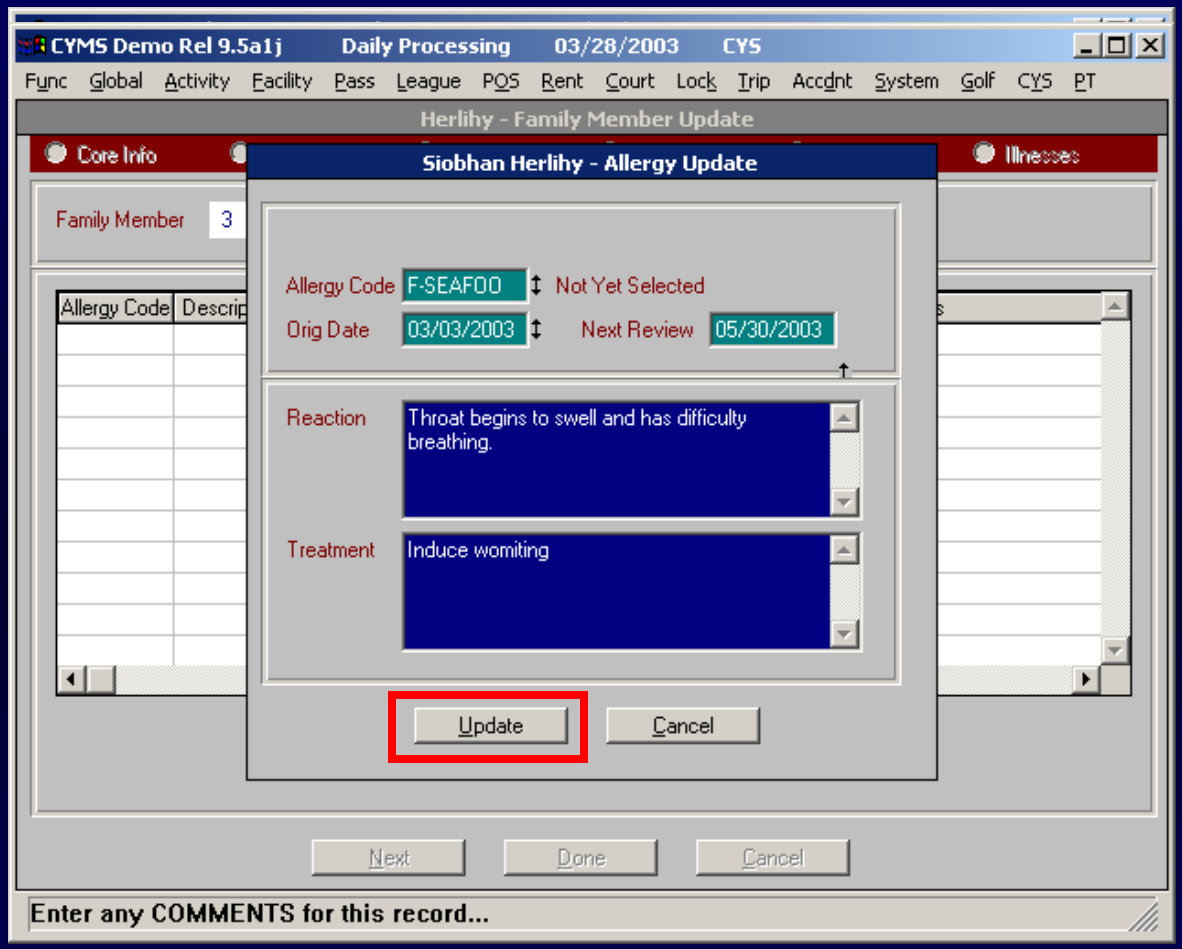
Allergies are sorted by type:

- E means Environmental.
- F means Food
- M means Medication

Child Input: Allergy Screen

Type in a Reaction and Treatment

You may also fill in the date fields if you wish to track this allergy.

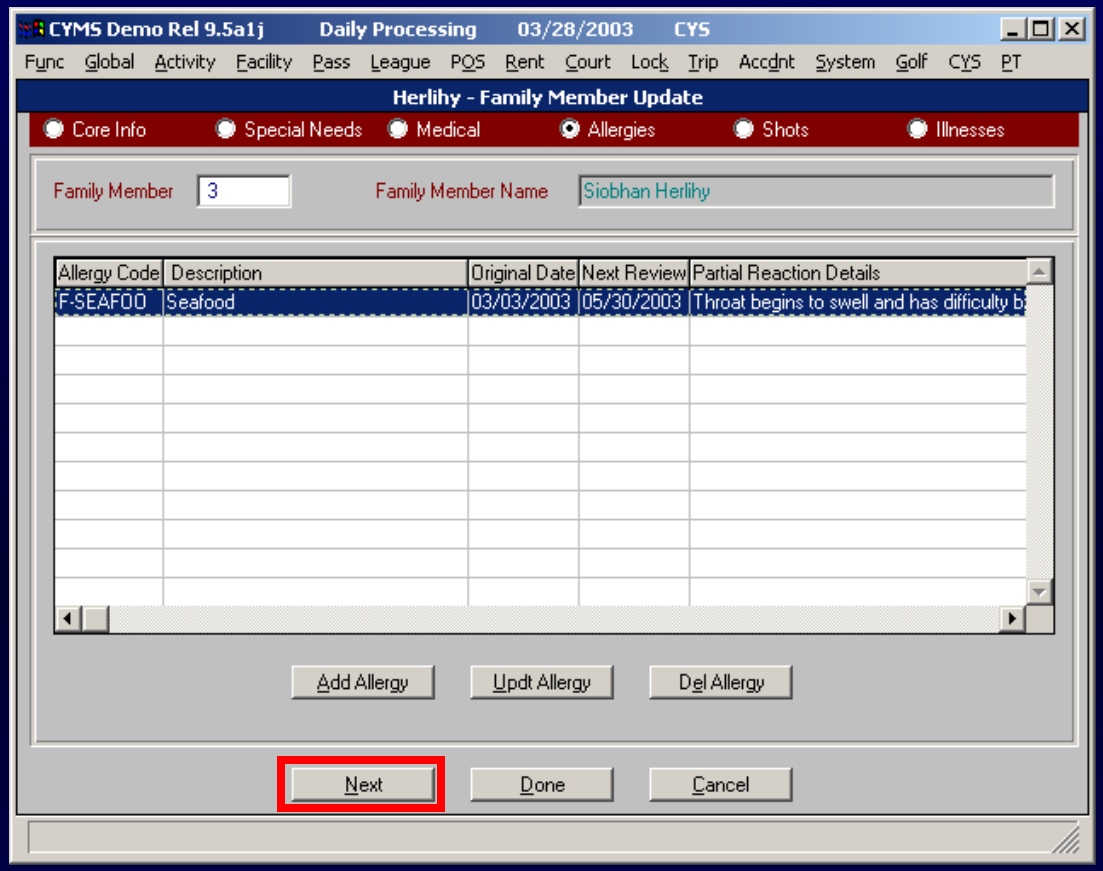


Then Click Update

If you have ideas for more allergy codes, contact CFSC.

Highlight the Allergy and select it

Child Input: Allergy Screen

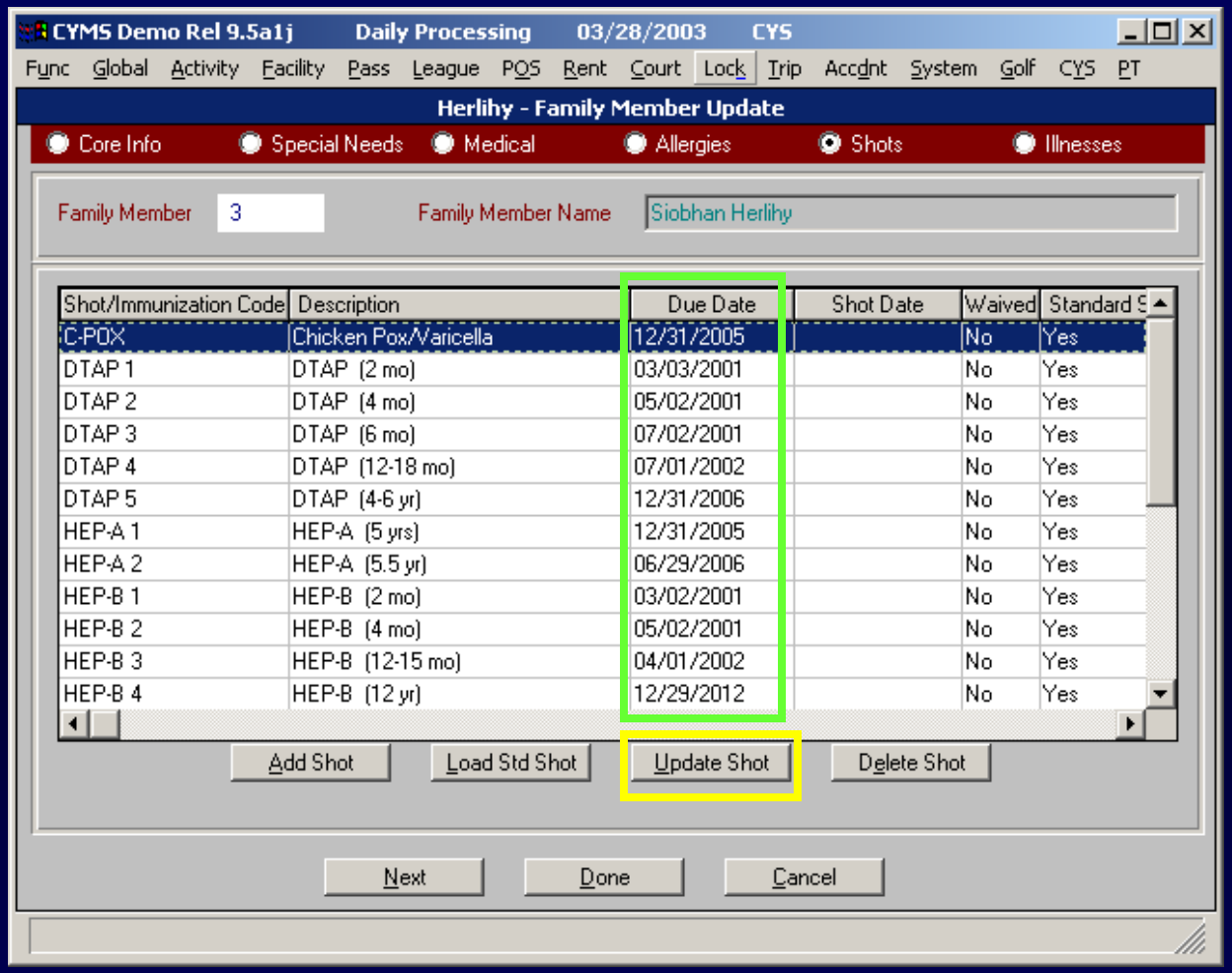


Repeat for all Allergies,

then Click Next

Child Input: Shots Screen

Notice the Due Date will fill in automatically based on the child's birthday


CYMS Demo Rel 9.5a1j
Daily Processing
03/28/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Herlihy - Family Member Update
Core Info
Special Needs
Medical
Allergies
Shots
Illnesses
Family Member 3
Family Member Name Siobhan Herlihy
Shot/Immunization Code | Description | Due Date | Shot Date | Waived | Standard S
C-POX | Chicken Pox/Varicella | 12/31/2005 | | No | Yes
DTAP 1 | DTAP (2 mo) | 03/03/2001 | | No | Yes
DTAP 2 | DTAP (4 mo) | 05/02/2001 | | No | Yes
DTAP 3 | DTAP (6 mo) | 07/02/2001 | | No | Yes
DTAP 4 | DTAP (12-18 mo) | 07/01/2002 | | No | Yes
DTAP 5 | DTAP (4-6 yr) | 12/31/2006 | | No | Yes
HEP-A 1 | HEP-A (5 yrs) | 12/31/2005 | | No | Yes
HEP-A 2 | HEP-A (5.5 yr) | 06/29/2006 | | No | Yes
HEP-B 1 | HEP-B (2 mo) | 03/02/2001 | | No | Yes
HEP-B 2 | HEP-B (4 mo) | 05/02/2001 | | No | Yes
HEP-B 3 | HEP-B (12-15 mo) | 04/01/2002 | | No | Yes
HEP-B 4 | HEP-B (12 yr) | 12/29/2012 | | No | Yes
Add Shot
Load Std Shot
Update Shot
Delete Shot
Next
Done
Cancel

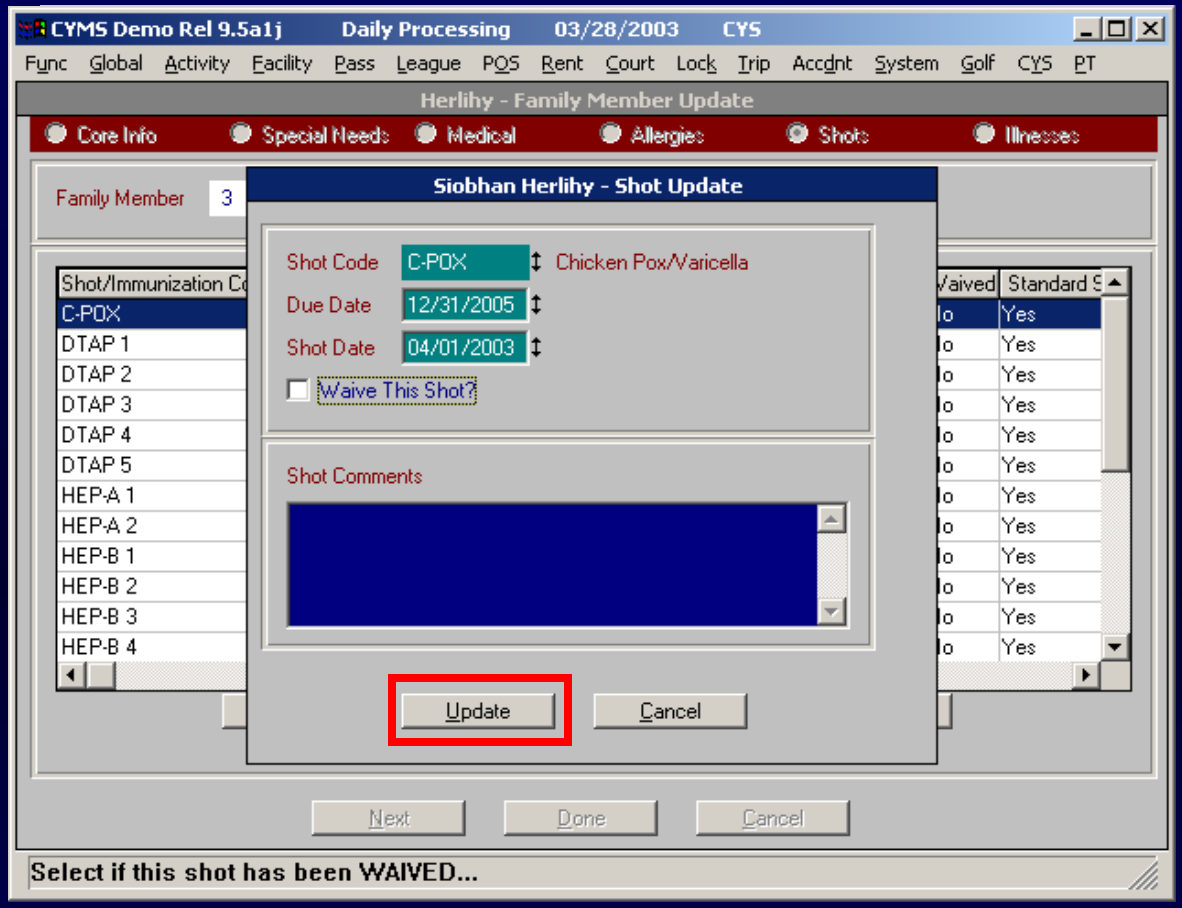
To Update a shot, Highlight it and Click Update Shot

Click Load Standard Shots if you are tracking shots on this child.

If you don't check shots on MST children, DON'T CLICK Load Standard Shots

Child Input: Shots Screen

In the Shot Date Field, type in the date the shot was received



Click Update

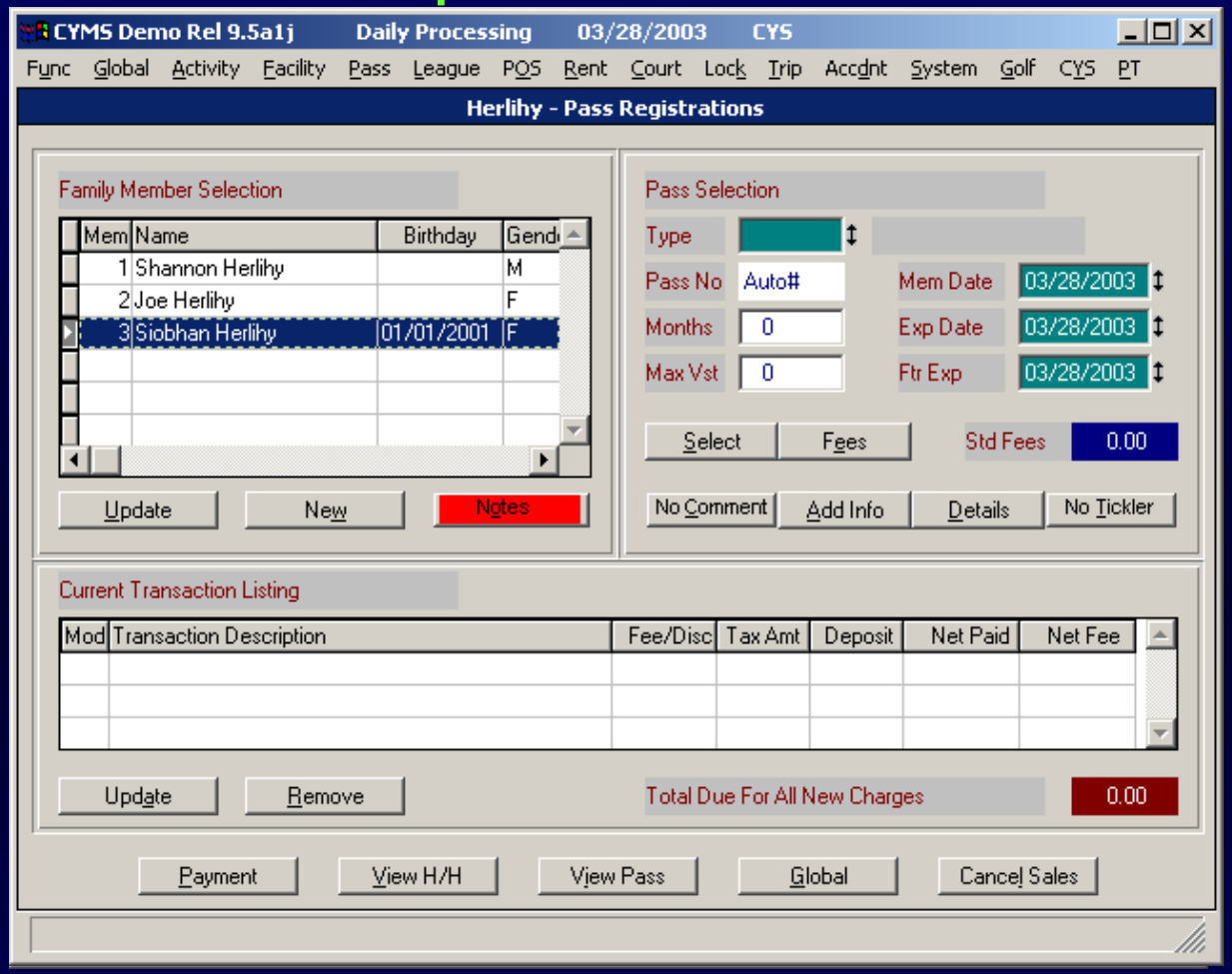
With doctor's approval, you may Waive a shot the child has missed. You should not delete shots from the child's record without guidance.

Shot requirements vary in some locations. If you need to adjust which shots are loaded as Standard, call CFSC or VSI for Info.

Child Input: Shots Screen

If you need to Add another child,

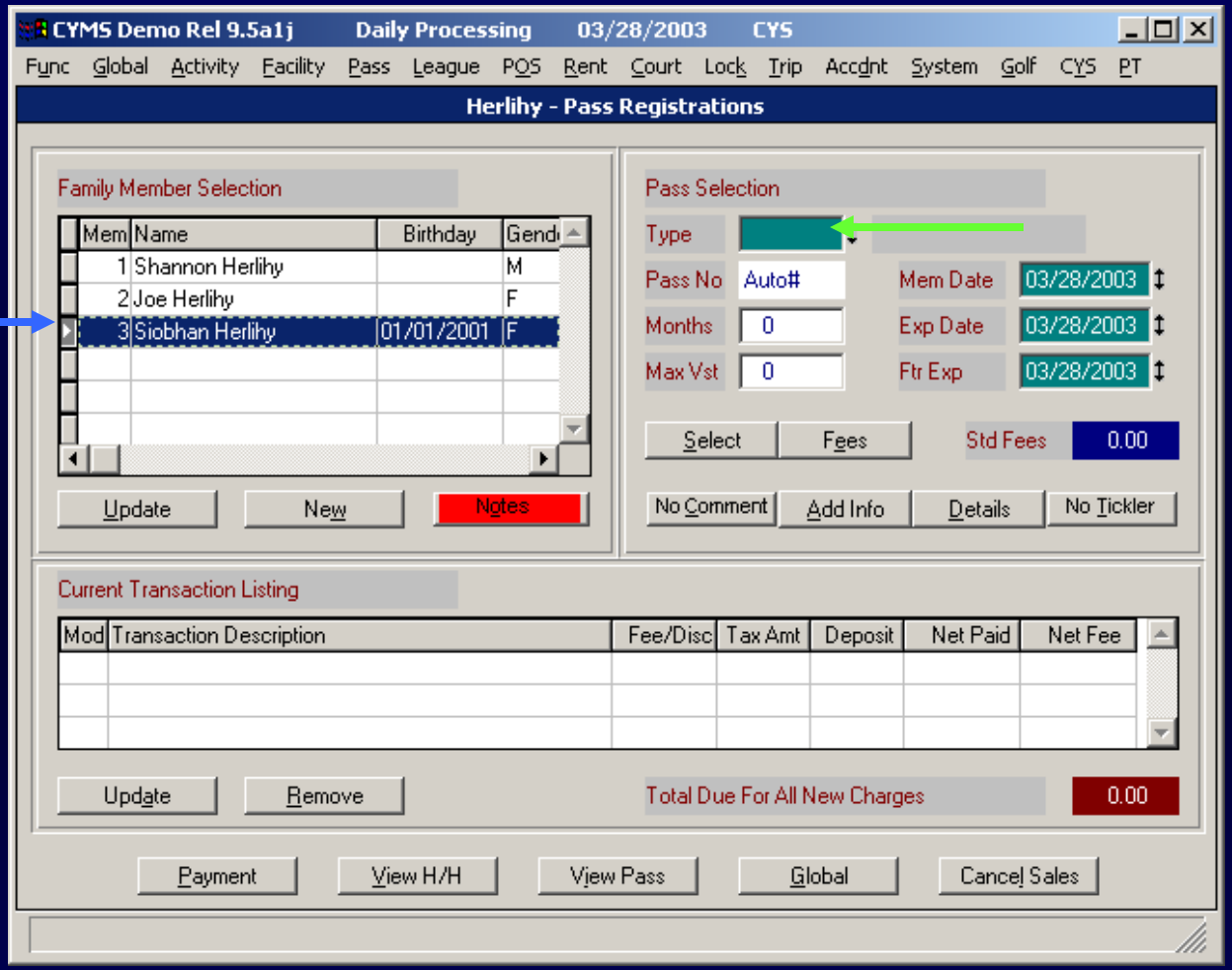
Click New and complete all required info.


CYMS Demo Rel 9.5a1j
Daily Processing
03/28/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Herlihy - Pass Registrations
Family Member Selection
Mem Name Birthday Gend
1 Shannon Herlihy M
2 Joe Herlihy F
3 Siobhan Herlihy 01/01/2001 F
Update New Notes
Pass Selection
Type
Pass No Auto#
Months 0
Max Vst 0
Mem Date 03/28/2003
Exp Date 03/28/2003
Ftr Exp 03/28/2003
Select Fees
Std Fees 0.00
No Comment Add Info Details No Tickler
Current Transaction Listing
Mod Transaction Description Fee/Disc Tax Amt Deposit Net Paid Net Fee
Update Remove
Total Due For All New Charges 0.00
Payment View H/H View Pass Global Cancel Sales

Otherwise we are ready to issue this child her passes

Continue Updating Shots that have been given to this child, then Click Done

Selling Passes



Highlight the child and

Right Click in the Type Field

Selling Passes

CDC Age children get

Child (CY-CDS) and Youth Privilege (CY-MZZ) Pass

SAS Age children get

SA (CY-SAS) and Youth Privilege (CY-MZZ) Pass

MST children only get

Middle School/Teen (CY-MST) Pass

MST Pass Note: Ask yourself is this child too old for CDC or SA care? --- if the answer is yes, the child should only get an MST pass.

If the answer is no, which type of care would they use (CDC or SA), and give them the appropriate pass plus the Privilege pass.

All CDC and SAS children get a Youth Privilege Pass – even if they don't use the Youth Center – even if they are an infant !

Selling Passes

Note:

A child should never have

A Child and a SA pass

Or

An MST and Child or SA pass

Or

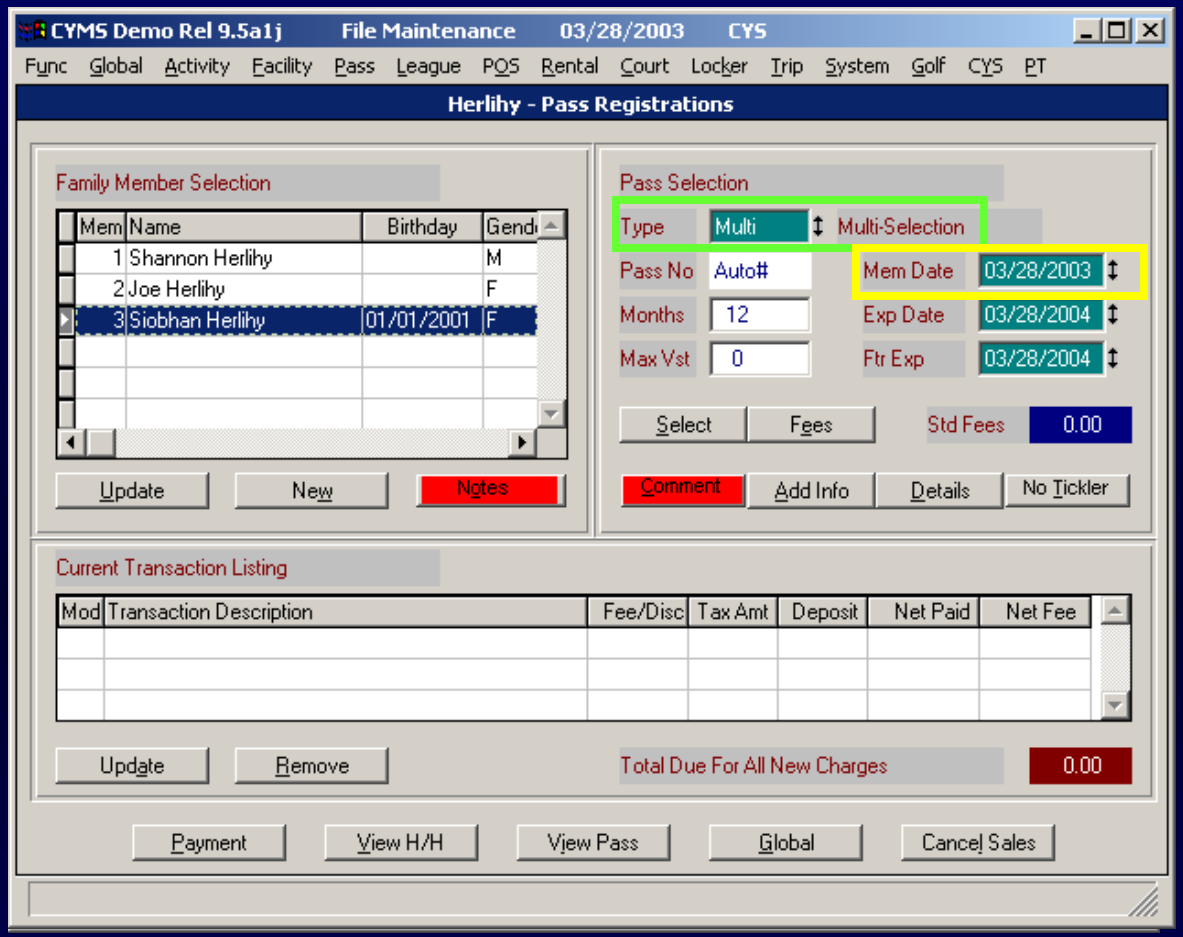
An MST and an MZZ pass

Or

Two of the same kind of passes

Selling Passes

Note: Multi means you selected more than one Pass


CYMS Demo Rel 9.5a1j
File Maintenance
03/28/2003
CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Herlihy - Pass Registrations
Family Member Selection
Mem Name Birthday Gend
1 Shannon Herlihy M
2 Joe Herlihy F
3 Siobhan Herlihy 01/01/2001 F
Update New Notes
Pass Selection
Type Multi Multi-Selection
Pass No Auto#
Mem Date 03/28/2003
Months 12
Exp Date 03/28/2004
Max Vst 0
Ftr Exp 03/28/2004
Select Fees Std Fees 0.00
Comment Add Info Details No Tickler
Current Transaction Listing
Mod Transaction Description Fee/Disc Tax Amt Deposit Net Paid Net Fee
Update Remove
Total Due For All New Charges 0.00
Payment View H/H View Pass Global Cancel Sales

Note: The Member Date defaults to the current date, so you will need to back date this to the last time this child re-registered

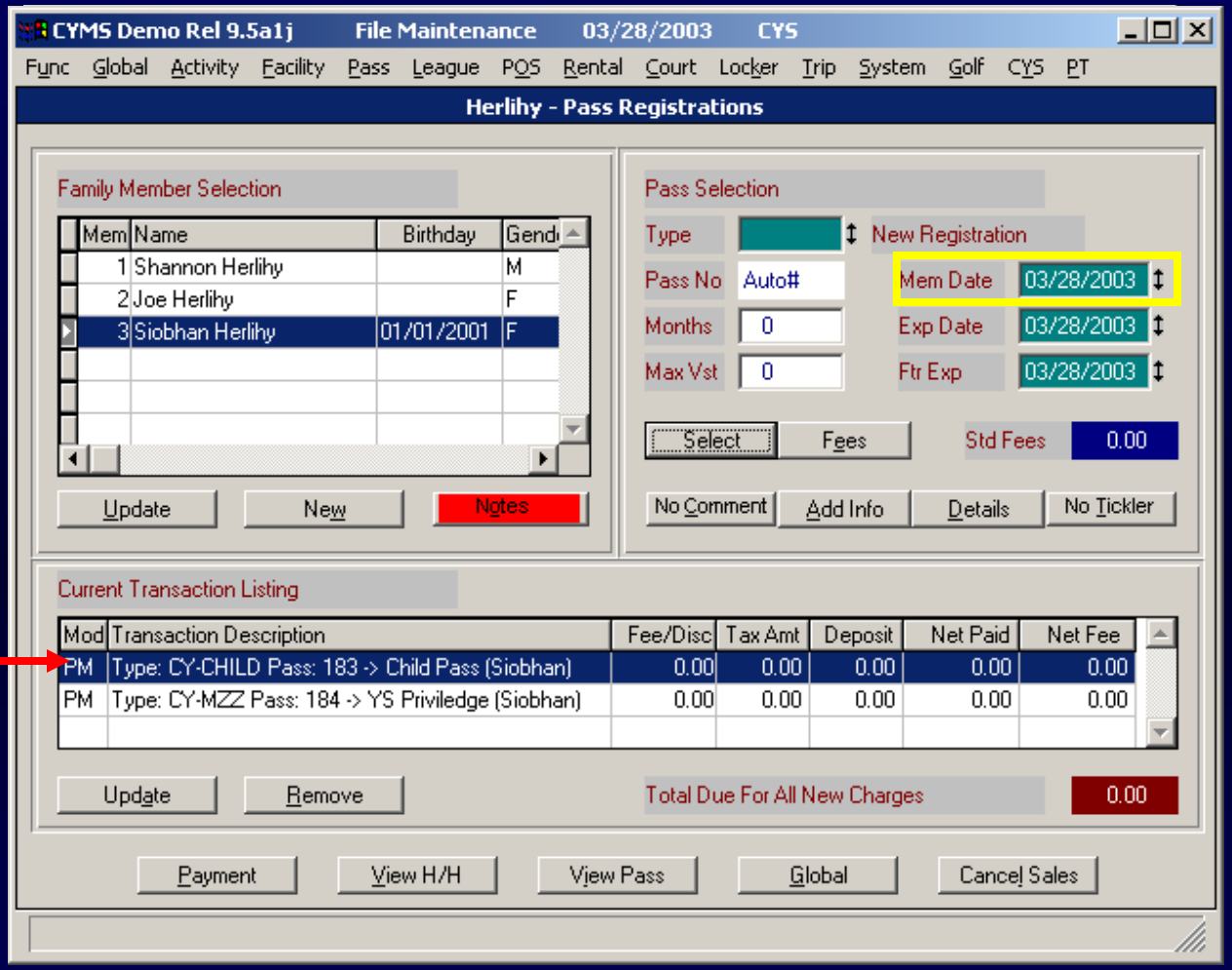
Highlight the appropriate pass/passes.

If giving more than one (CDC or SA), highlight one pass then hold your CTRL key and highlight the other.

Then click Select

Selling Passes

The Passes will move to the **'shopping cart'**

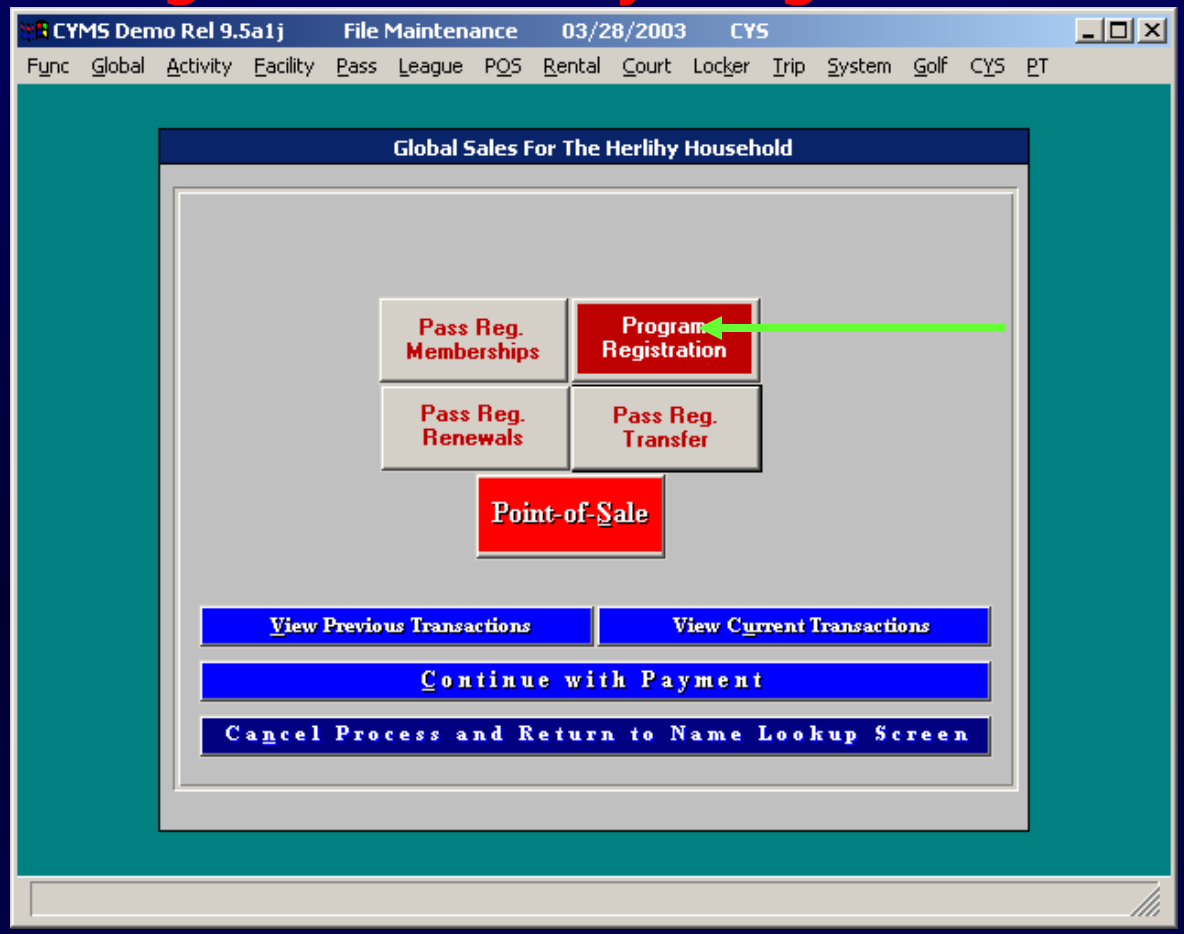

CYMS Demo Rel 9.5a1j
File Maintenance
03/28/2003
CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Herlihy - Pass Registrations
Family Member Selection
Mem Name Birthday Gend
1 Shannon Herlihy M
2 Joe Herlihy F
3 Siobhan Herlihy 01/01/2001 F
Update New Notes
Pass Selection
Type New Registration
Pass No Auto#
Mem Date 03/28/2003
Months 0
Exp Date 03/28/2003
Max Vst 0
Ftr Exp 03/28/2003
Select Fees
Std Fees 0.00
No Comment Add Info Details No Tickler
Current Transaction Listing
Mod Transaction Description Fee/Disc Tax Amt Deposit Net Paid Net Fee
PM Type: CY-CHILD Pass: 183 -> Child Pass (Siobhan) 0.00 0.00 0.00 0.00 0.00
PM Type: CY-MZZ Pass: 184 -> YS Priviledge (Siobhan) 0.00 0.00 0.00 0.00 0.00
Update Remove
Total Due For All New Charges
0.00
Payment View H/H View Pass Global Cancel Sales

Don't Panic !!

! The Member Date will change back to the current date for the next Pass Sale

Change your Member Date appropriately, then Click Select

Program/Activity Registration

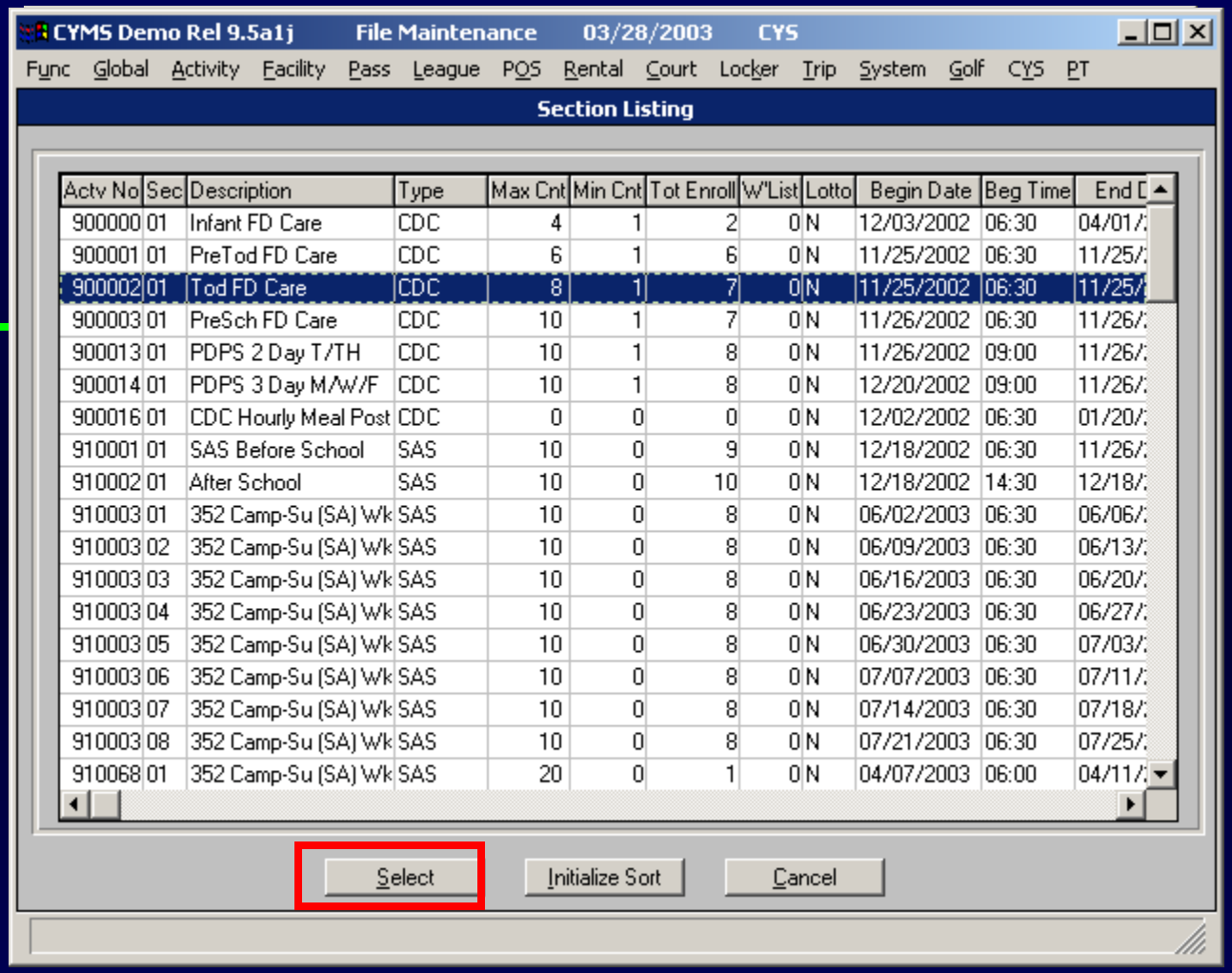


Click Program Registration

If other children in the household need passes, repeat the prior steps.

Otherwise, click Global to assign the child to a room

Program/Activity Registration



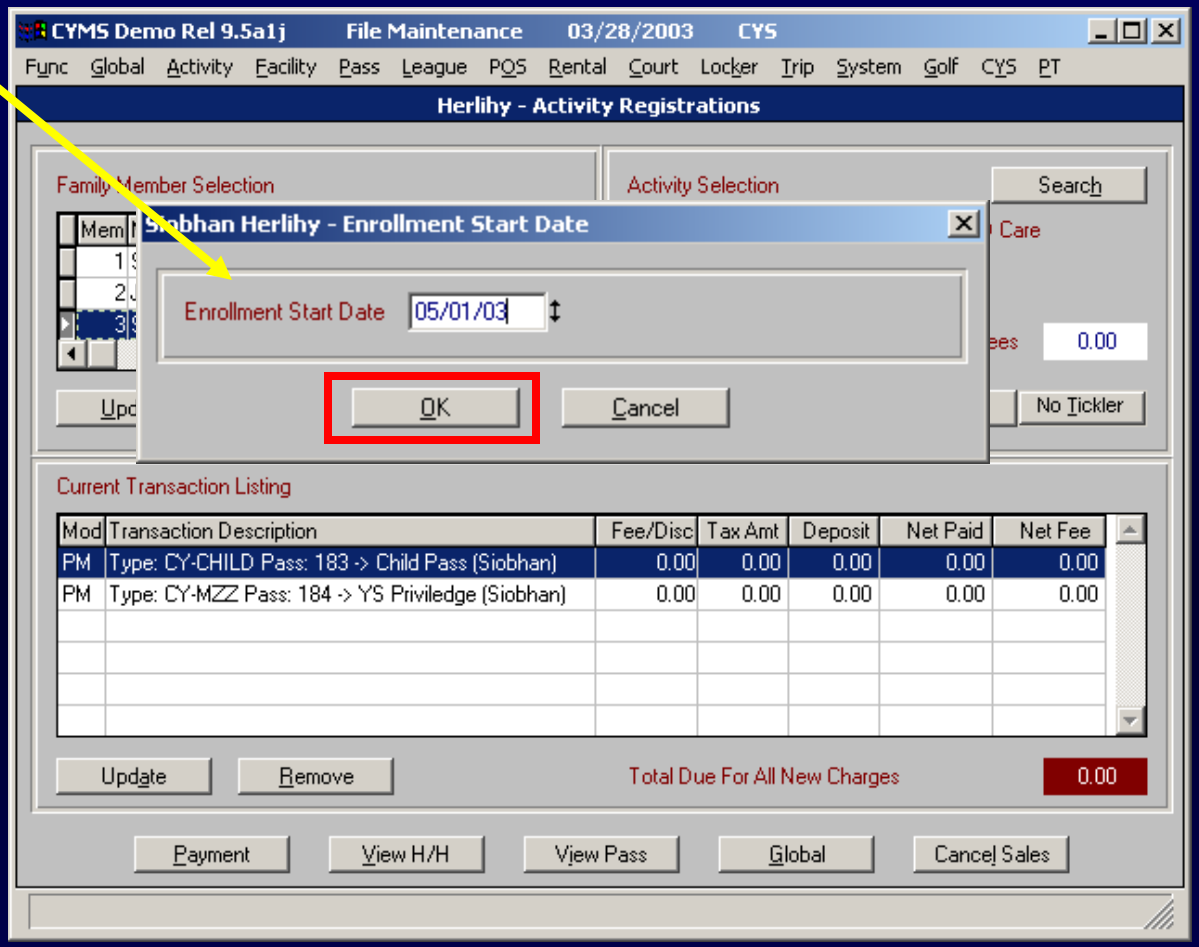
Highlight the Program and Select it

Highlight the child and

right click in the Actvity Number Field

Program/Activity Registration

Note:
After you go live the Start Date will be the actual day the child is starting in the center


CYMS Demo Rel 9.5a1j File Maintenance 03/28/2003 CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Herlihy - Activity Registrations
Family Member Selection
Activity Selection
Search
Siobhan Herlihy - Enrollment Start Date
Enrollment Start Date 05/01/03
OK
Cancel
Care
0.00
No Tickler
Current Transaction Listing
Mod Transaction Description Fee/Disc Tax Amt Deposit Net Paid Net Fee
PM Type: CY-CHILD Pass: 183 -> Child Pass (Siobhan) 0.00 0.00 0.00 0.00 0.00
PM Type: CY-MZZ Pass: 184 -> YS Priviledge (Siobhan) 0.00 0.00 0.00 0.00 0.00
Update
Remove
Total Due For All New Charges
0.00
Payment
View H/H
View Pass
Global
Cancel Sales

Click Select

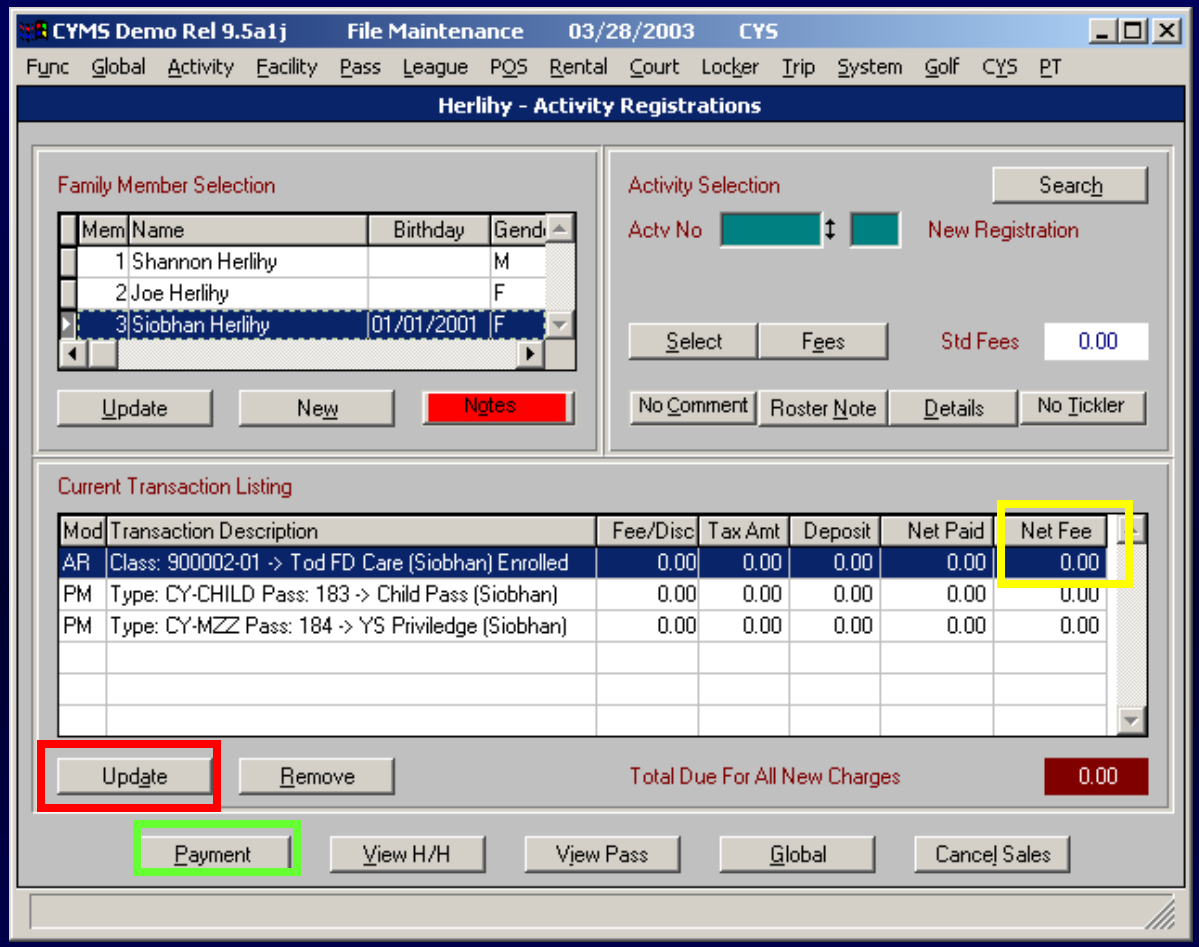
You may get Age/Grade conflict messages.

Read these carefully and respond appropriately.

When the Start Date pops up, plug your proposed live date and Click OK

Program/Activity Registration

Note: Once you go live the Net Fee will represent the prorated amount for that enrollment


CYMS Demo Rel 9.5a1j
File Maintenance
03/28/2003
CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Herlihy - Activity Registrations
Family Member Selection
Mem Name Birthday Gend
1 Shannon Herlihy M
2 Joe Herlihy F
3 Siobhan Herlihy 01/01/2001 F
Update New Notes
Activity Selection
Search
Actv No
New Registration
Select Fees
Std Fees 0.00
No Comment Roster Note Details No Tickler
Current Transaction Listing
Mod Transaction Description Fee/Disc Tax Amt Deposit Net Paid Net Fee
AR Class: 900002-01 -> Tod FD Care (Siobhan) Enrolled 0.00 0.00 0.00 0.00 0.00
PM Type: CY-CHILD Pass: 183 -> Child Pass (Siobhan) 0.00 0.00 0.00 0.00 0.00
PM Type: CY-MZZ Pass: 184 -> YS Priviledge (Siobhan) 0.00 0.00 0.00 0.00 0.00
Update Remove
Total Due For All New Charges
0.00
Payment View H/H View Pass Global Cancel Sales

When the Passes and Classes are in the **'shopping cart'**

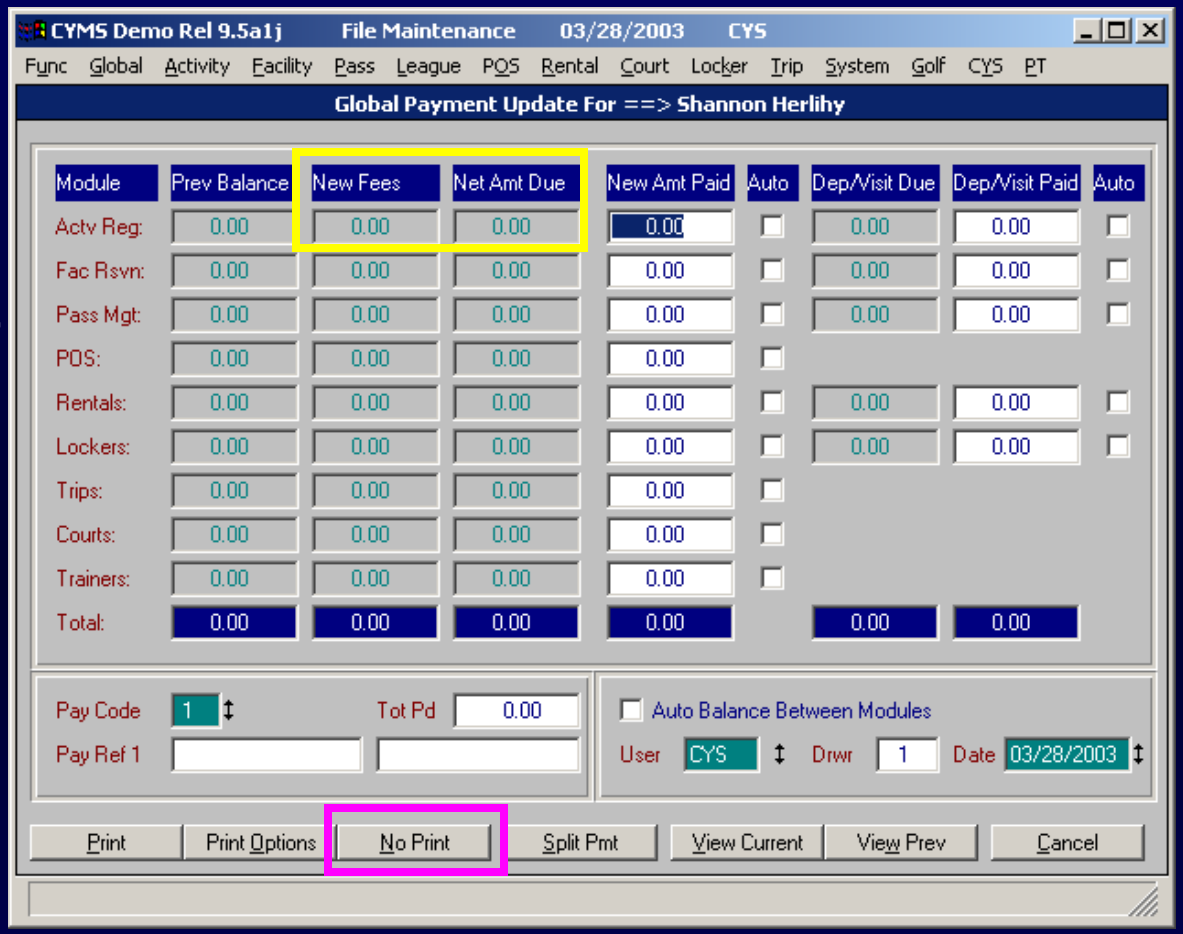
Click Payment

If the Net Fee is greater than Zero, it means your Start Date is not your Live Date.

You must click Update, Reselect the Class and change the Start Date appropriately

Program/Activity Registration

Otherwise, Click No Print to finish


CYMS Demo Rel 9.5a1j File Maintenance 03/28/2003 CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Global Payment Update For ==> Shannon Herlihy
Module Prev Balance New Fees Net Amt Due New Amt Paid Auto Dep/Visit Due Dep/Visit Paid Auto
Actv Reg: 0.00 0.00 0.00 0.00
Fac Rsvn: 0.00 0.00 0.00 0.00 0.00 0.00
Pass Mgt: 0.00 0.00 0.00 0.00 0.00 0.00
POS: 0.00 0.00 0.00 0.00
Rentals: 0.00 0.00 0.00 0.00 0.00 0.00
Lockers: 0.00 0.00 0.00 0.00 0.00 0.00
Trips: 0.00 0.00 0.00 0.00
Courts: 0.00 0.00 0.00 0.00
Trainers: 0.00 0.00 0.00 0.00
Total: 0.00 0.00 0.00 0.00 0.00 0.00
Pay Code 1
Tot Pd 0.00
Pay Ref 1
Auto Balance Between Modules
User CYS
Drwr 1
Date 03/28/2003
Print
Print Options
No Print
Split Pmt
View Current
View Prev
Cancel

After you go live, the actual amount due for this enrollment will be in the New Fees box.

Note: If you get to the payment screen and notice that you have New Fees greater than Zero,

Click Cancel and go back to the Global screen to fix.

Congratulations!

And only 1,000 more households to go!